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Certain processes and work instructions are common to multiple sections of the Steady State Manual. These processes may be performed by multiple workgroups and by Coalition as well as State staff.

Common processes include:

- Creating tasks
- Parking tasks
- Forwarding tasks
- Getting tasks
- Opening and closing tasks
- Managing documents
- Searching for a person, case, task or user
- Sending notices
- Processing solicited documents

[Tasks](#) (insert hyperlink)
[3.11.1](#)

[Document Management](#) (insert
hyperlink to Coalition Common
Processes)
[3.11.4](#)

[Searching](#) (insert hyperlink)
[3.11.4](#)

[Send Notice](#) (insert hyperlink)
[3.11.4](#)

[Process Solicited Documents](#)
(insert hyperlink to Coalition
Common Processes)
[3.11.5](#)

The specific instructions for each of these common processes are found in the following sections.

13.11. Creating, Parking, Forwarding, Getting and Opening Tasks

3.11.1.1 Overview

Tasks are triggered by the system or a user. Users may create tasks in two ways:

1. A user may select a task from a list. This process is referred to creating a user-selected task.
2. If the task is not on the pre-defined list, a user may create a user-defined task.

The following sub-sections provide instructions for a user to:

- Create user-selected tasks
- Create user-defined tasks
- Park tasks that may not be completed at the end of a work day, or need further processing
- Forward tasks to different work queues or FSSA individuals

Create a Task (insert hyperlink) 3.11.1.02	Create User Defined Tasks (insert hyperlink) 3.11.1.03	Create User-Defined Tasks from User Home Page (insert hyperlink) 3.11.1.04
Park a Task (insert hyperlink) 3.11.1.05	Retrieve a Parked Task (insert hyperlink) 3.11.1.06	Unable to Resolve a Parked Task (insert hyperlink) 3.11.1.07
Forward a Task (insert hyperlink) 3.11.1.08	Getting Tasks (insert hyperlink) 3.11.1.09	Getting the Next Task (insert hyperlink) 3.11.1.10

[Getting the Next Task
Automatically](#)

[3.11.1.11](#)(insert hyperlink)

[Opening a Task](#)

[3.11.1.10](#) (insert hyperlink)

[Closing a Task](#)

[3.11.1.13](#) (insert hyperlink)

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3.11.1.2 Create a Task

User-selected and user-defined tasks (insert hyperlink to 3.11.1.3) are generated when a task is being processed and the user recognizes that a related task needs to be created for another workgroup. In this instance, the system does not automatically create the task. Examples of user-selected tasks are:

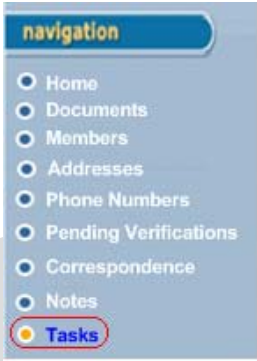
Complaint

Information Request from an External Party

Appeal Request

Independent Resource Assessment Request

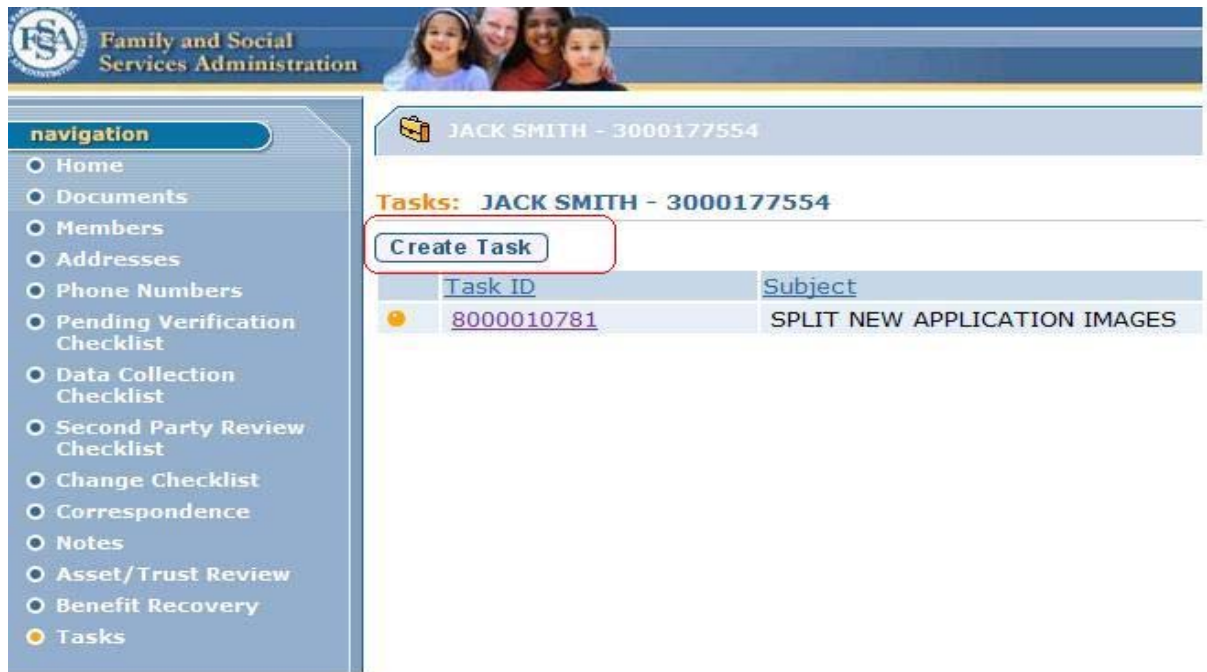
Out-of-state Inquiry Request

Step	Create User -Selected Tasks
1.	<p>Accessing tasks can be done through the User Home page, Case Home page or the Client Home page. When a user is already working in a case and needs to create a task, from the Case Home page or Client Home page, select <i>Tasks</i> from the left Navigation bar.</p>  <p>The screenshot shows a vertical navigation menu with a blue header labeled 'navigation'. Below the header, there is a list of menu items, each preceded by a circular icon. The items are: Home, Documents, Members, Addresses, Phone Numbers, Pending Verifications, Correspondence, Notes, and Tasks. The 'Tasks' item at the bottom is highlighted with a red circle.</p>

Step

Create User -Selected Tasks

2. Click *Create a Task*.



Family and Social Services Administration

navigation

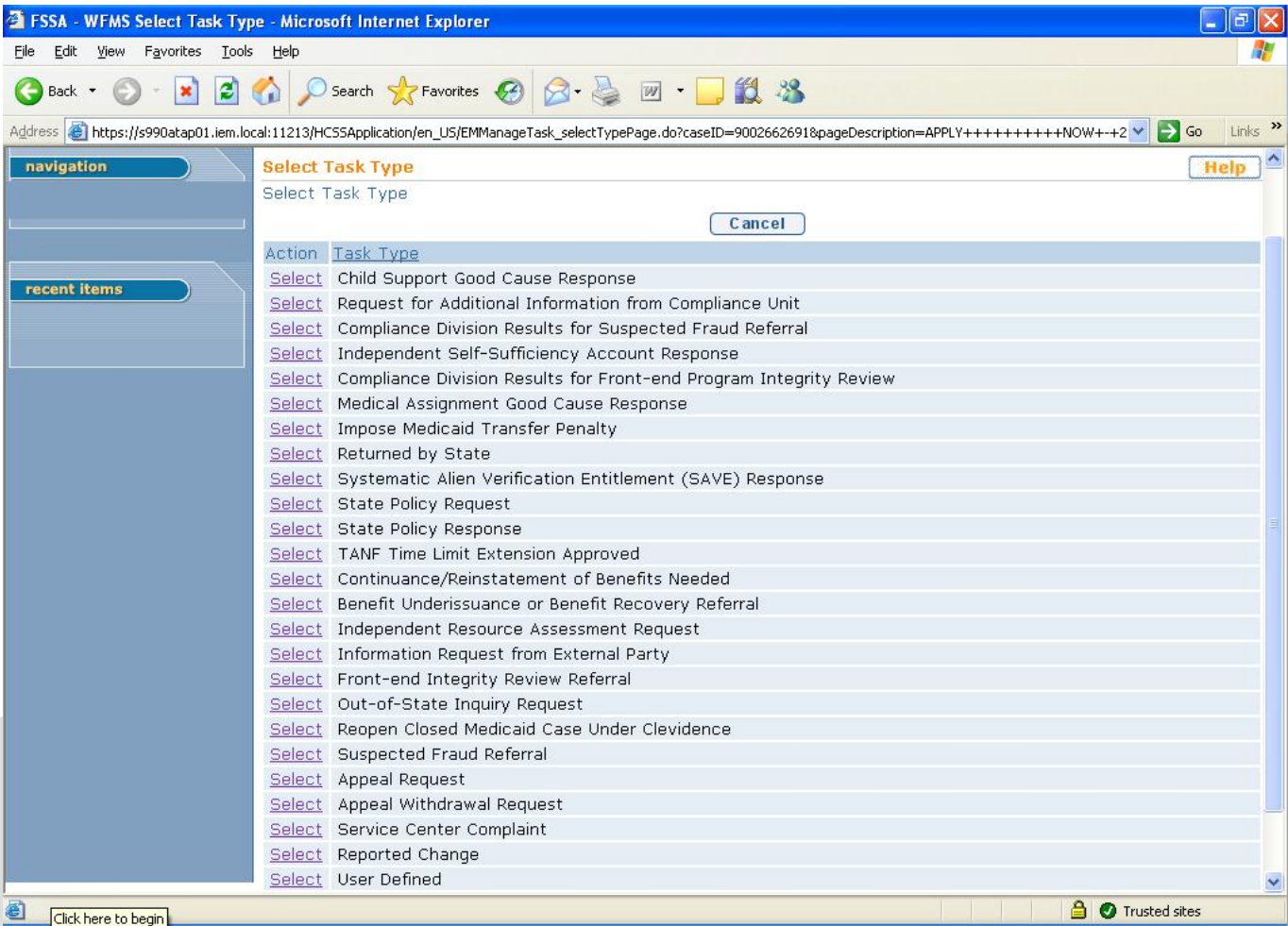
- Home
- Documents
- Members
- Addresses
- Phone Numbers
- Pending Verification Checklist
- Data Collection Checklist
- Second Party Review Checklist
- Change Checklist
- Correspondence
- Notes
- Asset/Trust Review
- Benefit Recovery
- Tasks**

JACK SMITH - 3000177554

Tasks: JACK SMITH - 3000177554

Create Task

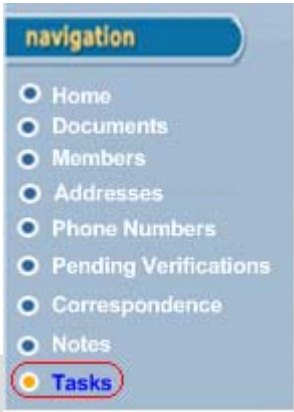

Task ID	Subject
8000010781	SPLIT NEW APPLICATION IMAGES

Step	Create User -Selected Tasks
3.	<p>The Select Task Type page displays a task list. Review the list and click <i>Select</i> to choose the Task Type that needs to be created. Scroll down function will allow the user to see the entire list. If the task is not shown on the list, select <i>User Defined</i> and refer to <i>Creating a User Defined Task</i> for instructions.</p>  <p>4. Click <i>Select</i>.</p> <p>The system creates the task for the appropriate queue. When opened, the task is displayed with the Case Reference information and task instructions.</p>

3.11.1.3 Create User-Defined Tasks

A user-defined task may be created by an internal user from the *Case Home* or the *Client Home* page when attempting to create a User-Selected task, but the user does not find the task on the Task Type list. The user chooses User-Defined from the bottom of the Task Type list. Refer to your work instructions to determine whether a user-defined task needs to be created and to identify the correct workgroup/queue to which the task is routed. This is critical to avoid misrouting of tasks.

A user-defined task may also be created from the User Home page. This function is used when a user-defined task is created by the Call Center for the Service Center, or when a task is created to which no case or Client is associated. An example is when a complaint is received without case identifying information. Refer to Section 3.11.1.4 (Insert hyperlink), Create User-Defined Tasks from User Home Page.

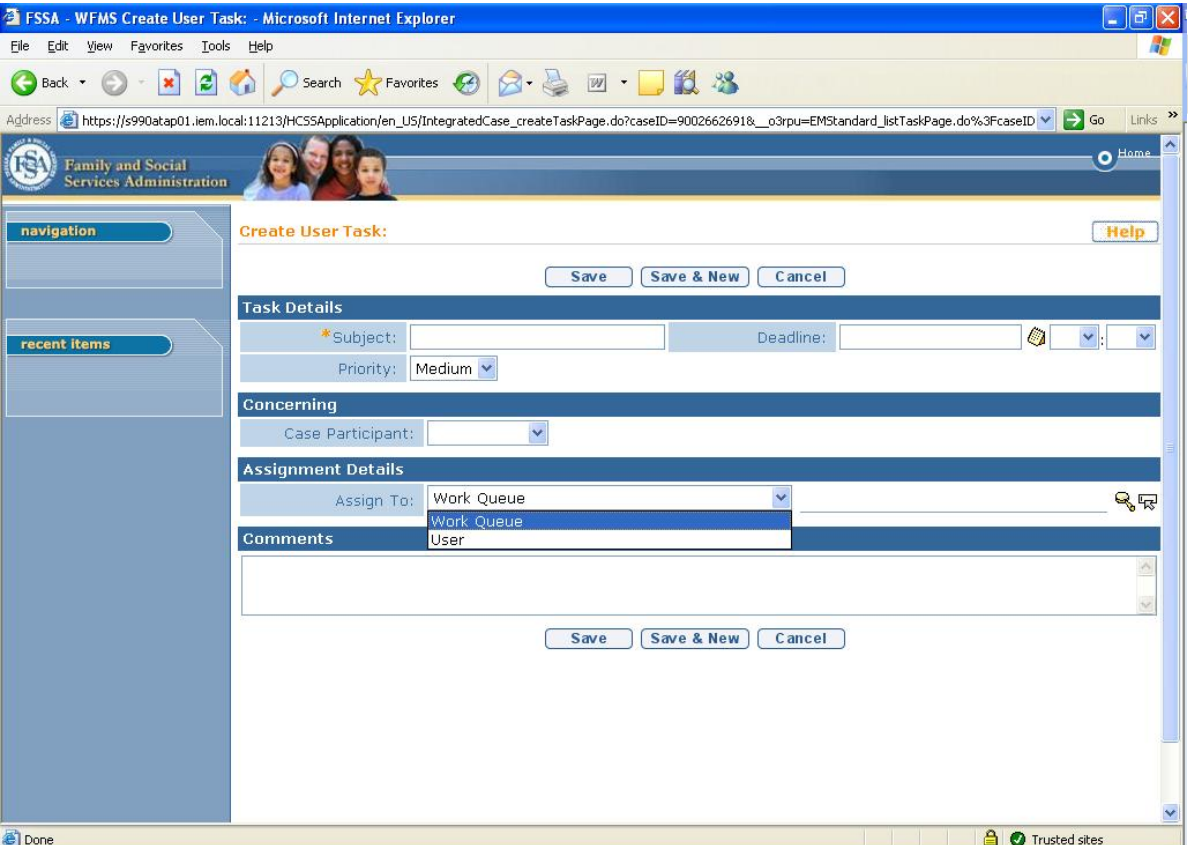
Step	Create User-Defined Task – User Working in the Case
1.	<div>From the Case Home or Client Home page, select <i>Tasks</i> from the left Navigation bar.</div> <div></div>
2.	<div>Click Create a Task</div> <div></div>

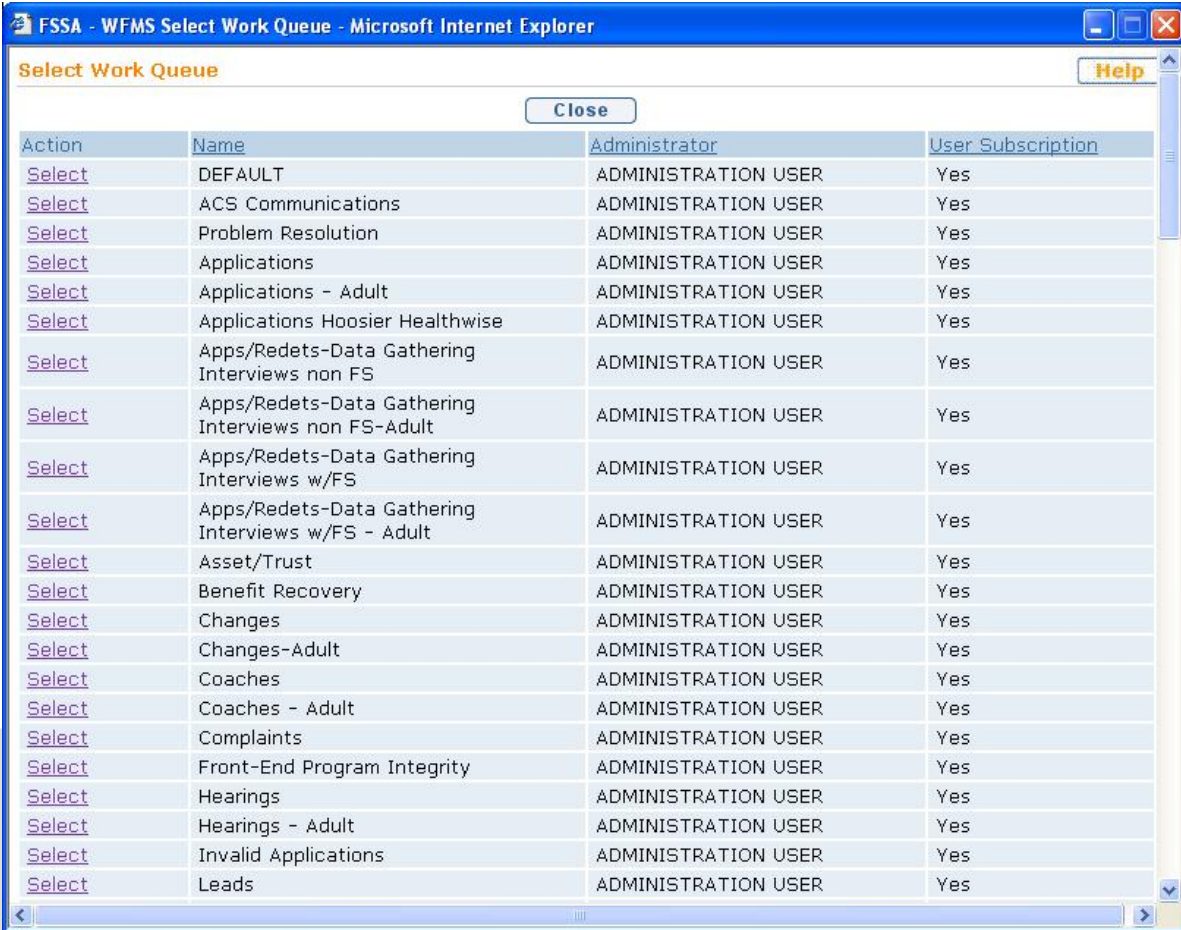
Step**Create User-Defined Task – User Working in the Case**

3. Select *User Defined* from the bottom of the Select Task Type list.

The screenshot shows a web browser window titled "FSSA - WFMS Select Task Type - Microsoft Internet Explorer". The address bar displays the URL: https://s990atap01.iem.local:11213/HCSSApplication/en_US/EMManageTask_selectTypePage.do?caseID=9002662691&pageDescription=APPLY+++++++NOW++2. The page has a navigation sidebar on the left with "recent items" and a main content area titled "Select Task Type". The main area contains a table with two columns: "Action" and "Task Type". The "Task Type" column lists various task types, with "User Defined" at the bottom. Each row has a "Select" link in the "Action" column.

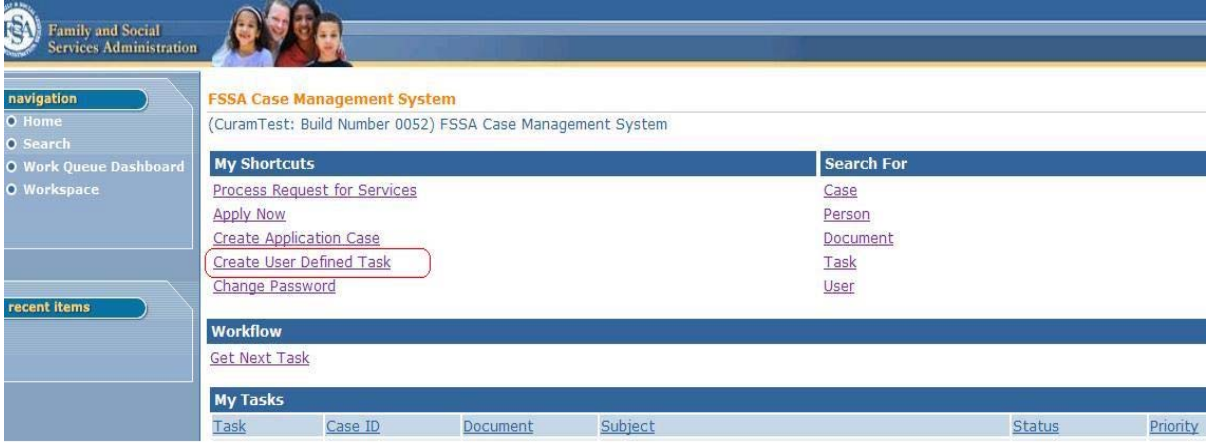
Action	Task Type
Select	Child Support Good Cause Response
Select	Request for Additional Information from Compliance Unit
Select	Compliance Division Results for Suspected Fraud Referral
Select	Independent Self-Sufficiency Account Response
Select	Compliance Division Results for Front-end Program Integrity Review
Select	Medical Assignment Good Cause Response
Select	Impose Medicaid Transfer Penalty
Select	Returned by State
Select	Systematic Alien Verification Entitlement (SAVE) Response
Select	State Policy Request
Select	State Policy Response
Select	TANF Time Limit Extension Approved
Select	Continuance/Reinstatement of Benefits Needed
Select	Benefit Underissuance or Benefit Recovery Referral
Select	Independent Resource Assessment Request
Select	Information Request from External Party
Select	Front-end Integrity Review Referral
Select	Out-of-State Inquiry Request
Select	Reopen Closed Medicaid Case Under Clevidence
Select	Suspected Fraud Referral
Select	Appeal Request
Select	Appeal Withdrawal Request
Select	Service Center Complaint
Select	Reported Change
Select	User Defined

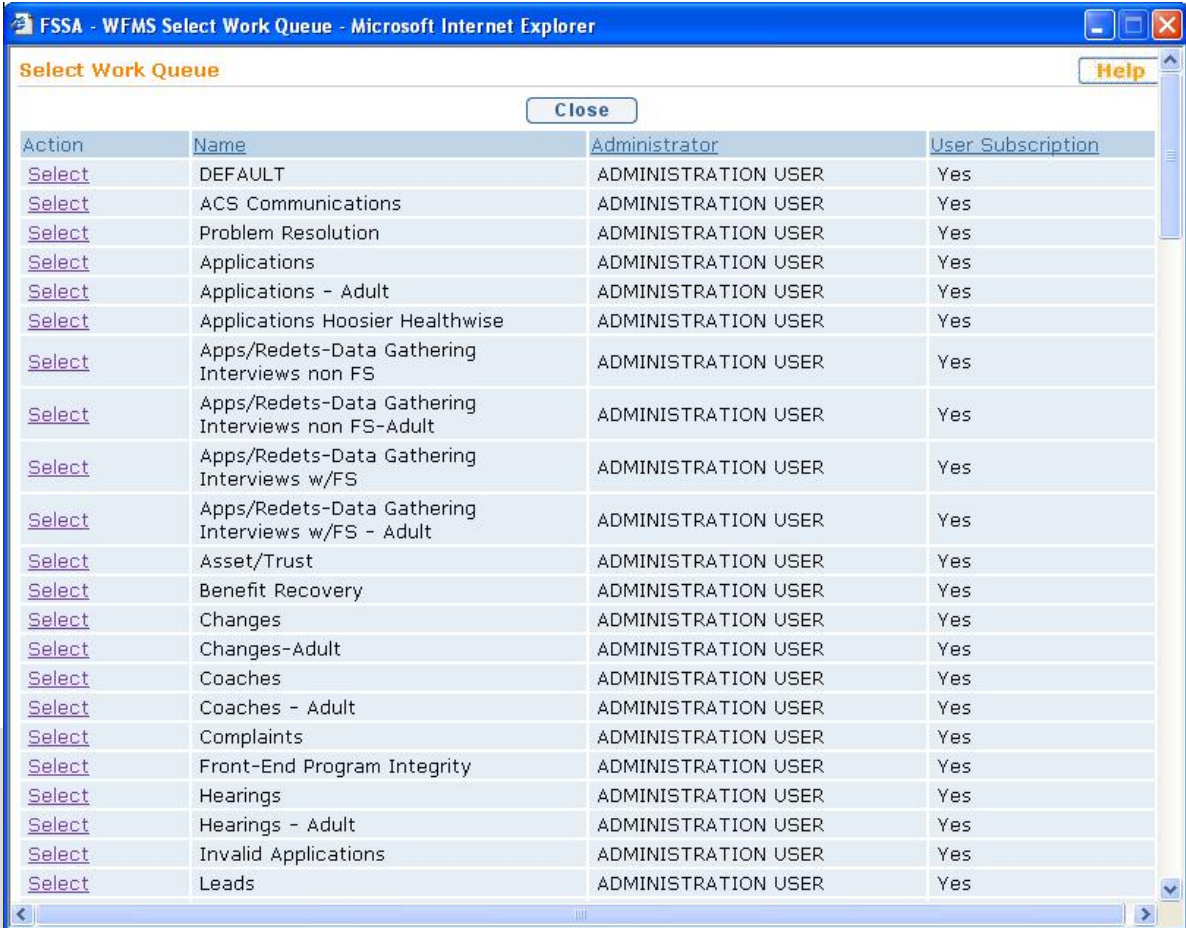
Step	Create User-Defined Task – User Working in the Case
4.	<p>The Create User Task page displays.</p> <ul style="list-style-type: none"> ✓ A concise subject should be entered, unless other instructions are provided defining what the Subject title should be. ✓ The deadline (including the time) that should be entered is the day the task is created + 2 business days, unless other instructions are provided. ✓ The priority is Medium, unless other instructions are provided. ✓ Select the individual in the case from the Case Participant dropdown to which this task is associated. ✓ To locate the correct work queue or FSSA individual when creating the task, select either Work Queue or User from the Assign To: dropdown and click on the <i>magnifying glass icon</i> to the right. ✓ Include a concise description of any other important task details in the Comments box. 

Step	Create User-Defined Task – User Working in the Case																																																																																												
5.	<p>To locate the correct work queue when creating the task, click the magnifying glass icon to the right of the work queue field. All State queues begin with FSSA, for example "FSSA Fiat Authorization".</p>  <table><thead><tr><th>Action</th><th>Name</th><th>Administrator</th><th>User Subscription</th></tr></thead><tbody><tr><td>Select</td><td>DEFAULT</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>ACS Communications</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Problem Resolution</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Applications</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Applications - Adult</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Applications Hoosier Healthwise</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Apps/Redets-Data Gathering Interviews non FS</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Apps/Redets-Data Gathering Interviews non FS-Adult</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Apps/Redets-Data Gathering Interviews w/FS</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Apps/Redets-Data Gathering Interviews w/FS - Adult</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Asset/Trust</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Benefit Recovery</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Changes</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Changes-Adult</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Coaches</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Coaches - Adult</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Complaints</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Front-End Program Integrity</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Hearings</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Hearings - Adult</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Invalid Applications</td><td>ADMINISTRATION USER</td><td>Yes</td></tr><tr><td>Select</td><td>Leads</td><td>ADMINISTRATION USER</td><td>Yes</td></tr></tbody></table>	Action	Name	Administrator	User Subscription	Select	DEFAULT	ADMINISTRATION USER	Yes	Select	ACS Communications	ADMINISTRATION USER	Yes	Select	Problem Resolution	ADMINISTRATION USER	Yes	Select	Applications	ADMINISTRATION USER	Yes	Select	Applications - Adult	ADMINISTRATION USER	Yes	Select	Applications Hoosier Healthwise	ADMINISTRATION USER	Yes	Select	Apps/Redets-Data Gathering Interviews non FS	ADMINISTRATION USER	Yes	Select	Apps/Redets-Data Gathering Interviews non FS-Adult	ADMINISTRATION USER	Yes	Select	Apps/Redets-Data Gathering Interviews w/FS	ADMINISTRATION USER	Yes	Select	Apps/Redets-Data Gathering Interviews w/FS - Adult	ADMINISTRATION USER	Yes	Select	Asset/Trust	ADMINISTRATION USER	Yes	Select	Benefit Recovery	ADMINISTRATION USER	Yes	Select	Changes	ADMINISTRATION USER	Yes	Select	Changes-Adult	ADMINISTRATION USER	Yes	Select	Coaches	ADMINISTRATION USER	Yes	Select	Coaches - Adult	ADMINISTRATION USER	Yes	Select	Complaints	ADMINISTRATION USER	Yes	Select	Front-End Program Integrity	ADMINISTRATION USER	Yes	Select	Hearings	ADMINISTRATION USER	Yes	Select	Hearings - Adult	ADMINISTRATION USER	Yes	Select	Invalid Applications	ADMINISTRATION USER	Yes	Select	Leads	ADMINISTRATION USER	Yes
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3.11.1.4 Create User-Defined Tasks from User Home page

A user-defined task may also be created from the User Home page; this function is **only used when a task is created to which no Case or Client is associated**. An example is when a complaint is received without any case identifying information.



Step	Create User-Defined Task from User Home page
1.	<p>From the User Home page, click <i>Create User-Defined Task</i>.</p> 

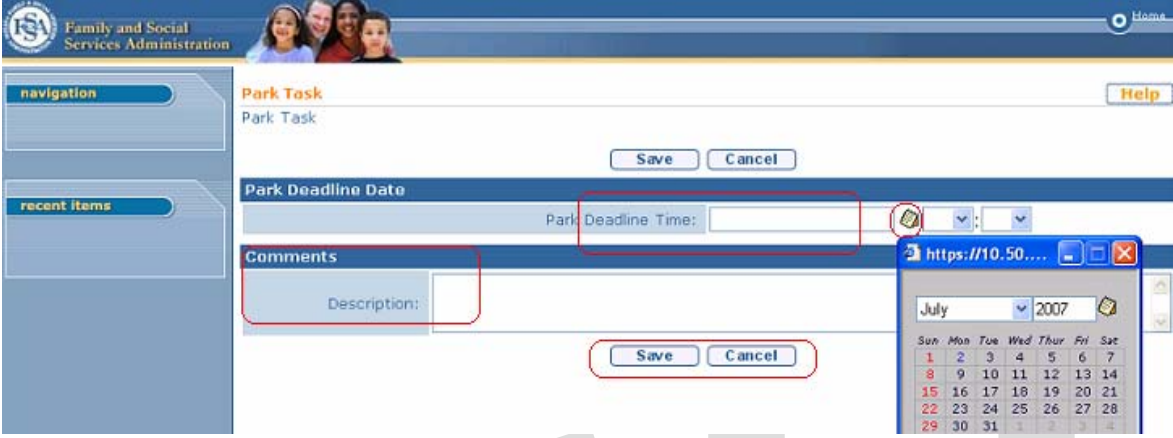
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3.11.1.5 Park a Task

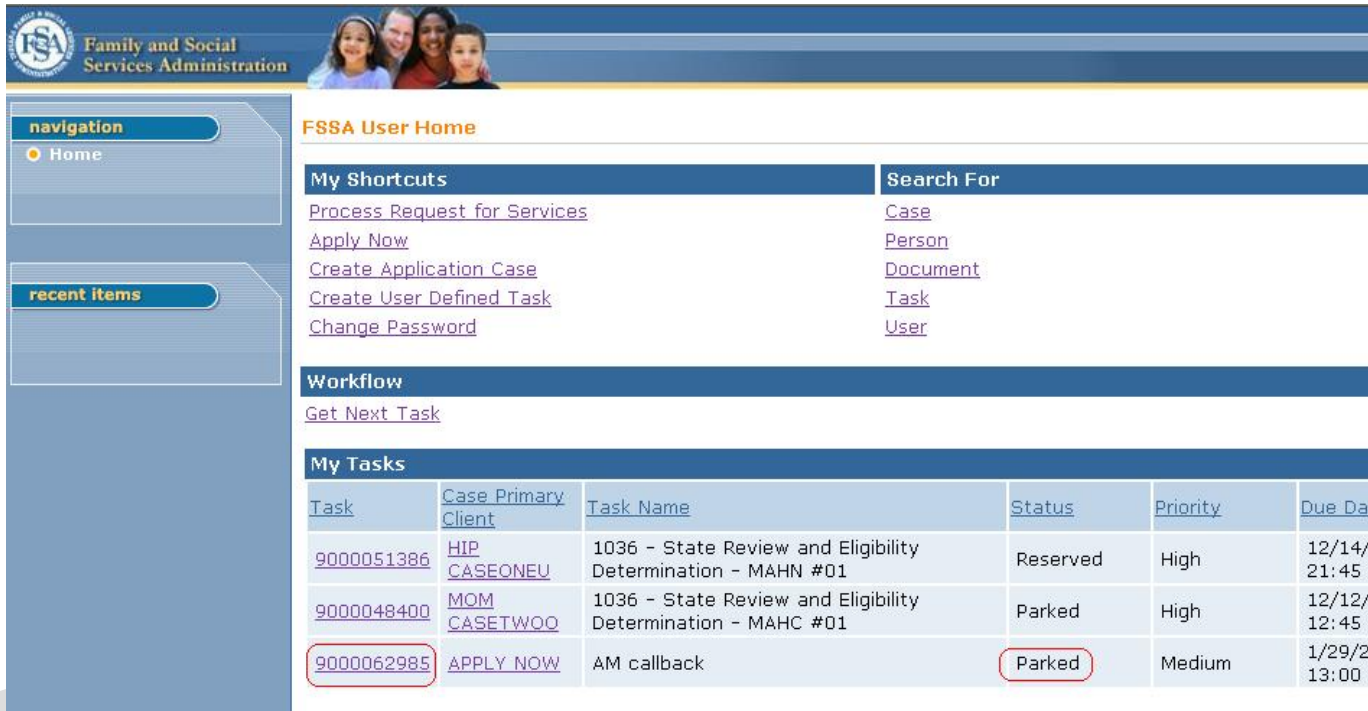
If a task is being processed but is not yet completed at the end of the work day, it may be necessary to Park the task and continue processing at a future point. A task may also be parked if telephone contact with a Client or applicant is required, and they cannot be reached in the first call attempt. The task is parked until the second attempt to


contact the Client; depending on the result of that contact, additional action is taken, and the task is completed and closed. Tasks not completed by the task deadline are automatically returned to the work queue.

Step	Parking a Task																		
1.	<p>Select the Task Home page.</p>  <p>The screenshot shows the FSSA User Home page. The navigation menu on the left has 'Home' selected. The main content area includes 'My Shortcuts', 'Search For', 'Workflow', and 'My Tasks'.</p> <table border="1"><thead><tr><th>Task</th><th>Case Primary Client</th><th>Task Name</th><th>Status</th><th>Priority</th><th>Due Date</th></tr></thead><tbody><tr><td>9000062985</td><td>APPLY NOW</td><td>AM callback</td><td>Reserved</td><td>Medium</td><td>1/29/2013 13:00</td></tr><tr><td>9000048400</td><td>MOM CASETWO</td><td>1036 - State Review and Eligibility Determination - MAHC #01</td><td>Parked</td><td>High</td><td>12/12/2012 12:45</td></tr></tbody></table>	Task	Case Primary Client	Task Name	Status	Priority	Due Date	9000062985	APPLY NOW	AM callback	Reserved	Medium	1/29/2013 13:00	9000048400	MOM CASETWO	1036 - State Review and Eligibility Determination - MAHC #01	Parked	High	12/12/2012 12:45
Task	Case Primary Client	Task Name	Status	Priority	Due Date														
9000062985	APPLY NOW	AM callback	Reserved	Medium	1/29/2013 13:00														
9000048400	MOM CASETWO	1036 - State Review and Eligibility Determination - MAHC #01	Parked	High	12/12/2012 12:45														
2.	<p>In the Task Home page, click <i>Park Task</i>.</p>  <p>The screenshot shows the Task Home page. The navigation menu on the left has 'Task Home' selected. The main content area includes 'Options' and 'Subject'.</p>																		





Step	Parking a Task
3.	<p>In the Park Deadline Date, the default deadline is two business days, although an FSSA user may set an earlier or later deadline.</p> <p>Under the Description, enter the following information:</p> <ul style="list-style-type: none"> ✓ The reason the task is being parked. ✓ A summary of actions taken before parking the task. ✓ Actions needed to complete processing the task. 
4.	Click <i>Save</i> .
5.	The <i>Task Home</i> page of the next available task will appear.

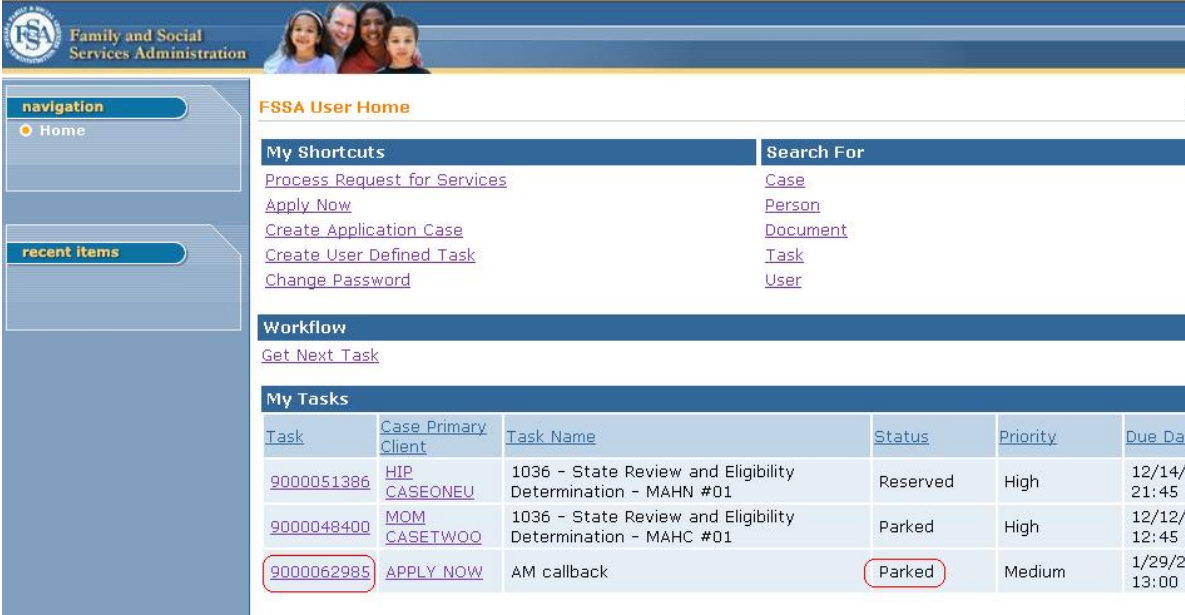
3.11.1.6 Retrieve a Parked Task

Step	Retrieving a Parked Task																								
1.	<p>Periodically, during the day, review the tasks on your User Home page that show a status of Parked. Retrieve a Parked task from the list by clicking its <i>Task ID</i>, under the My Tasks heading.</p>  <p>The screenshot shows the FSSA User Home page. On the left is a navigation sidebar with 'Home' selected. The main content area has a header 'FSSA User Home'. Below it are 'My Shortcuts' (Process Request for Services, Apply Now, Create Application Case, Create User Defined Task, Change Password) and a 'Search For' section (Case, Person, Document, Task, User). A 'Workflow' section contains 'Get Next Task'. The 'My Tasks' section contains a table with the following data:</p> <table><tr><th>Task</th><th>Case Primary Client</th><th>Task Name</th><th>Status</th><th>Priority</th><th>Due Date</th></tr><tr><td>9000051386</td><td>HIP CASEONEU</td><td>1036 - State Review and Eligibility Determination - MAHN #01</td><td>Reserved</td><td>High</td><td>12/14/21:45</td></tr><tr><td>9000048400</td><td>MOM CASETWO</td><td>1036 - State Review and Eligibility Determination - MAHC #01</td><td>Parked</td><td>High</td><td>12/12/12:45</td></tr><tr><td>9000062985</td><td>APPLY NOW</td><td>AM callback</td><td>Parked</td><td>Medium</td><td>1/29/213:00</td></tr></table>	Task	Case Primary Client	Task Name	Status	Priority	Due Date	9000051386	HIP CASEONEU	1036 - State Review and Eligibility Determination - MAHN #01	Reserved	High	12/14/21:45	9000048400	MOM CASETWO	1036 - State Review and Eligibility Determination - MAHC #01	Parked	High	12/12/12:45	9000062985	APPLY NOW	AM callback	Parked	Medium	1/29/213:00
Task	Case Primary Client	Task Name	Status	Priority	Due Date																				
9000051386	HIP CASEONEU	1036 - State Review and Eligibility Determination - MAHN #01	Reserved	High	12/14/21:45																				
9000048400	MOM CASETWO	1036 - State Review and Eligibility Determination - MAHC #01	Parked	High	12/12/12:45																				
9000062985	APPLY NOW	AM callback	Parked	Medium	1/29/213:00																				
2.	Review the reason the task was parked, the actions that need to be taken, and the deadline.																								
3.	<p>Are you able to take appropriate action to process the parked task by the deadline?</p> <p>✓ If yes, go to Step 4.</p> <p>✓ If no, go to <i>Unable to Resolve a Parked Task</i> below (insert hyperlink to section 3.11.1.7).</p>																								
4.	Document the action taken.																								
5.	<p>Close the task by clicking <i>Home</i> in the upper right corner.</p> <p>The User Home page is displayed.</p>																								

Step	Retrieving a Parked Task
6.	<p>Click the <i>Task ID</i> for the task with a Parked Status.</p>  <p>The WFMS displays the Task Home page.</p>
7.	Under the Options cluster, click <i>Close the Task</i> .
8.	The <i>Task Home</i> page of the next available task will appear.

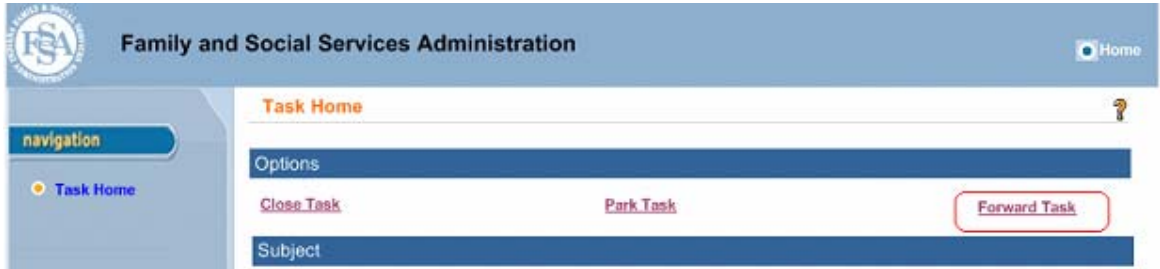

3.11.1.7 Unable to Resolve a Parked Task

Step	Unable to Resolve a Parked Task																								
1.	<p>Review parked tasks from the User Home page.</p> <div><div><div>Family and Social Services Administration</div><div></div></div><div><div><div>navigation</div><div>Home</div></div><div><div>recent items</div></div></div><div><div>FSSA User Home</div><div><div>My Shortcuts</div><div>Process Request for Services Apply Now Create Application Case Create User Defined Task Change Password</div><div><div>Search For</div><div>Case Person Document Task User</div></div></div><div><div>Workflow</div><div>Get Next Task</div></div><div><div>My Tasks</div><table><thead><tr><th>Task</th><th>Case Primary Client</th><th>Task Name</th><th>Status</th><th>Priority</th><th>Due Date</th></tr></thead><tbody><tr><td>9000051386</td><td>HIP CASEONEU</td><td>1036 - State Review and Eligibility Determination - MAHN #01</td><td>Reserved</td><td>High</td><td>12/14/21:45</td></tr><tr><td>9000048400</td><td>MOM CASETWOQ</td><td>1036 - State Review and Eligibility Determination - MAHC #01</td><td>Parked</td><td>High</td><td>12/12/12:45</td></tr><tr><td>9000062985</td><td>APPLY NOW</td><td>AM callback</td><td>Parked</td><td>Medium</td><td>1/29/213:00</td></tr></tbody></table></div></div></div>	Task	Case Primary Client	Task Name	Status	Priority	Due Date	9000051386	HIP CASEONEU	1036 - State Review and Eligibility Determination - MAHN #01	Reserved	High	12/14/21:45	9000048400	MOM CASETWOQ	1036 - State Review and Eligibility Determination - MAHC #01	Parked	High	12/12/12:45	9000062985	APPLY NOW	AM callback	Parked	Medium	1/29/213:00
Task	Case Primary Client	Task Name	Status	Priority	Due Date																				
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9000062985	APPLY NOW	AM callback	Parked	Medium	1/29/213:00																				
2.	<p>If unable to resolve the issue, review and follow the task instructions. As appropriate, generate a notice to the Client or third party.</p> <div><div><div>Family and Social Services Administration</div><div></div></div><div><div><div>navigation</div><div>Task Home Task History Task Assignment List Graphical View</div></div><div><div>recent items</div></div></div><div><div>Task Home</div><div><div>Options</div><div>Close Task Park Task Forward Task</div></div><div><div>Subject</div><div>AM callback</div></div><div><div>Details</div><table><tbody><tr><td>Task ID:</td><td>9000062985</td><td>Status:</td><td>Parked</td></tr><tr><td>Priority:</td><td>Medium</td><td>Deadline:</td><td>1/29/2008 13:00</td></tr><tr><td>Reserved By:</td><td>Deborah Crosby</td><td>Last Assigned:</td><td>1/28/2008 15:23</td></tr><tr><td>Time Worked:</td><td>00:00 [Change]</td><td>Park Deadline:</td><td>2/9/2008 12:03</td></tr></tbody></table></div><div><div>Primary Action</div><div>Supporting Information</div></div><div><div>Task Instructions</div><div>Attempted call at 10:00 using home# listed in case. Try again at 10:30. See CLRC for detail. Task parked.</div></div></div></div>	Task ID:	9000062985	Status:	Parked	Priority:	Medium	Deadline:	1/29/2008 13:00	Reserved By:	Deborah Crosby	Last Assigned:	1/28/2008 15:23	Time Worked:	00:00 [Change]	Park Deadline:	2/9/2008 12:03								
Task ID:	9000062985	Status:	Parked																						
Priority:	Medium	Deadline:	1/29/2008 13:00																						
Reserved By:	Deborah Crosby	Last Assigned:	1/28/2008 15:23																						
Time Worked:	00:00 [Change]	Park Deadline:	2/9/2008 12:03																						
3.	Create a case note in ICES (or WFMS if there is no case in ICES) documenting attempts to contact the Client or other reason task not resolved.																								
4.	Take all actions appropriate at this point in time. Click <i>Home</i> in the upper right corner to display the User Home page to continue working.																								

Step	Unable to Resolve a Parked Task
5.	<p>Click the <i>Task ID</i> for the task with a Parked Status that cannot be resolved.</p>  <p>The WFMS displays the Task Home page.</p>
6.	Under the Options cluster, click <i>Close the Task</i> .
7.	The <i>Task Home</i> page of the next available task will appear.

3.11.1.8 Forward a Task

While a task is being processed, it may be necessary to forward a task to another workgroup and/or queue for another internal user to process.

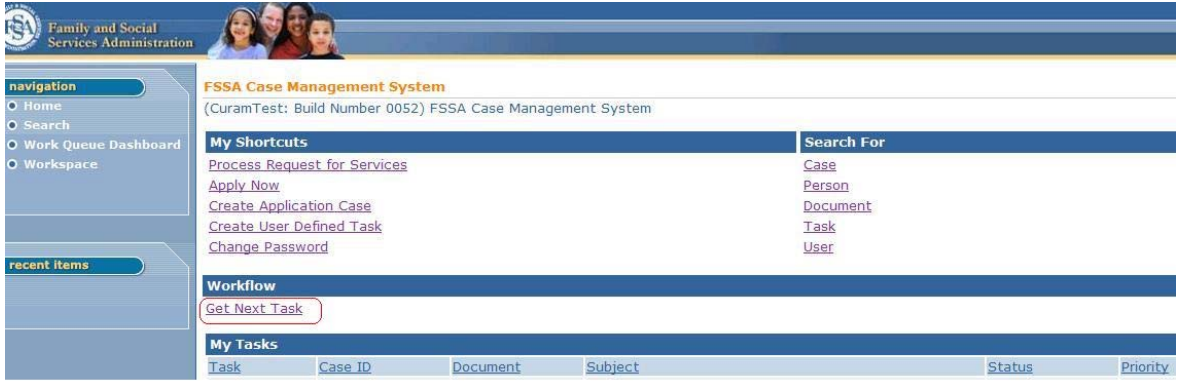
Step	Forwarding a Task
1.	From the WFMS, go to the Task Home page.
2.	<p>From the Task Home page, select <i>Forward Task</i>.</p> 
3.	<p>The Forward Task page is displayed.</p> <p>Based on the instructions for the task you are working on, identify and select the Work Queue or FSSA User to which the task should be forwarded. Make the selection in the Assign To drop-down box. Click on the magnifying glass to the right to choose the appropriate Work Queue or User.</p> <p>Note: All FSSA work queue names are indicated by FSSA in the queue name.</p> 
4.	Enter clear and concise instructions and comments regarding the task, and why it is being forwarded to that Work Queue or FSSA User.
5.	Click <i>Save</i> . The task is forwarded to the Work Queue or FSSA User selected.
6.	The <i>Task Home</i> page of the next available task will appear.

3.11.1.9 Getting Tasks

The process for getting a task differs depending on whether the user is getting the task upon initially signing on during the day or getting the task upon closing a previous task.

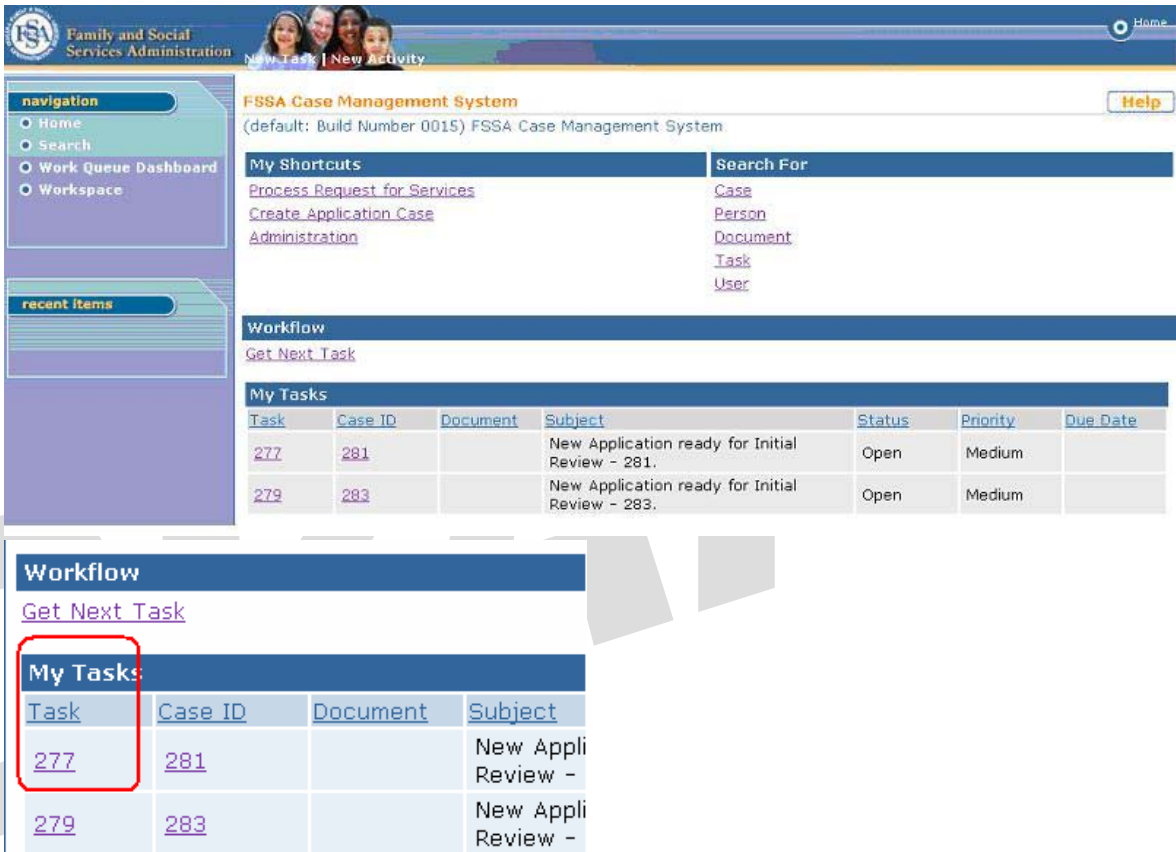
3.11.1.10 Getting the Next Task

To get the first task, the internal user initially signs on to the system and clicks *Get Next Task* from the User Home page. After that, this feature is not used because the action of closing a task results in the WFMS pushing the next task to the user, based on the user's assigned (subscribed) work queues.

Step	Getting the Next Task
1.	<p>From the User Home page, under the Workflow cluster, click <i>Get Next Task</i>.</p> 

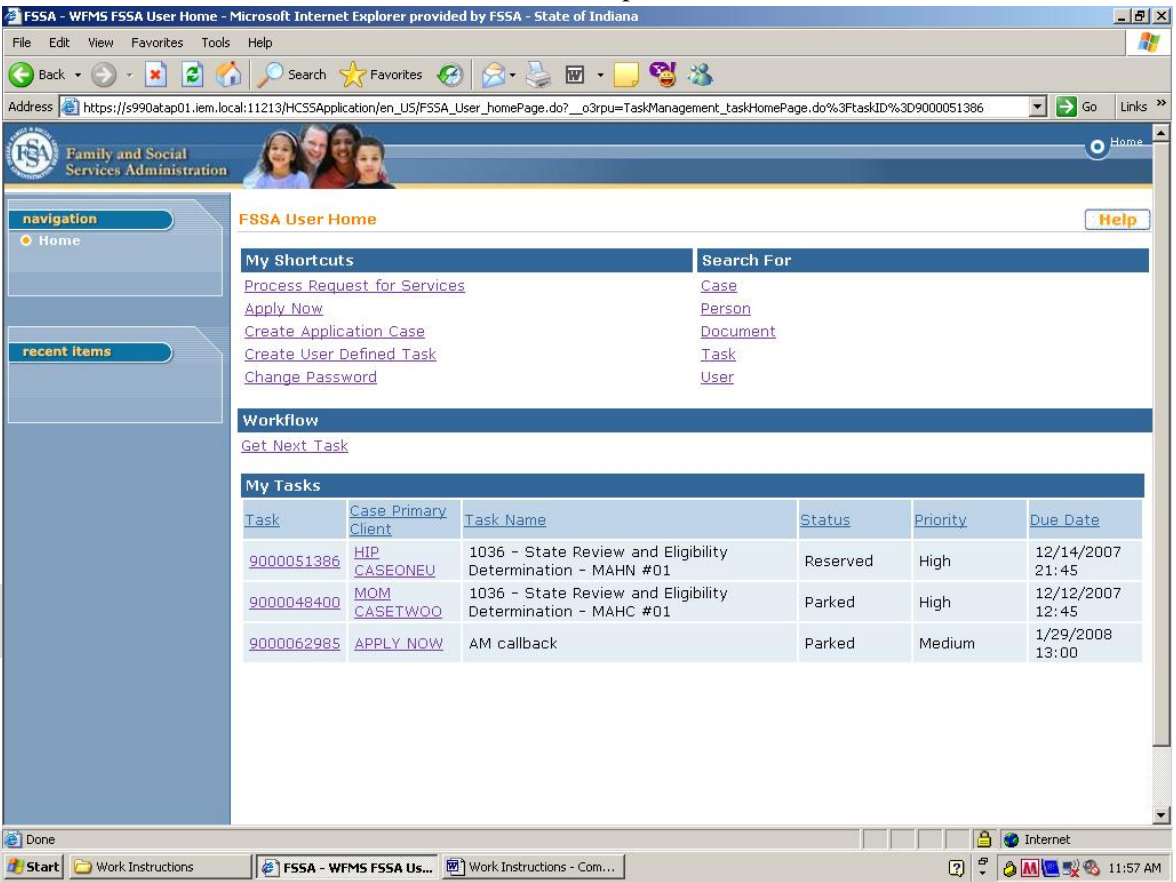
3.11.1.11 Getting a Task Automatically

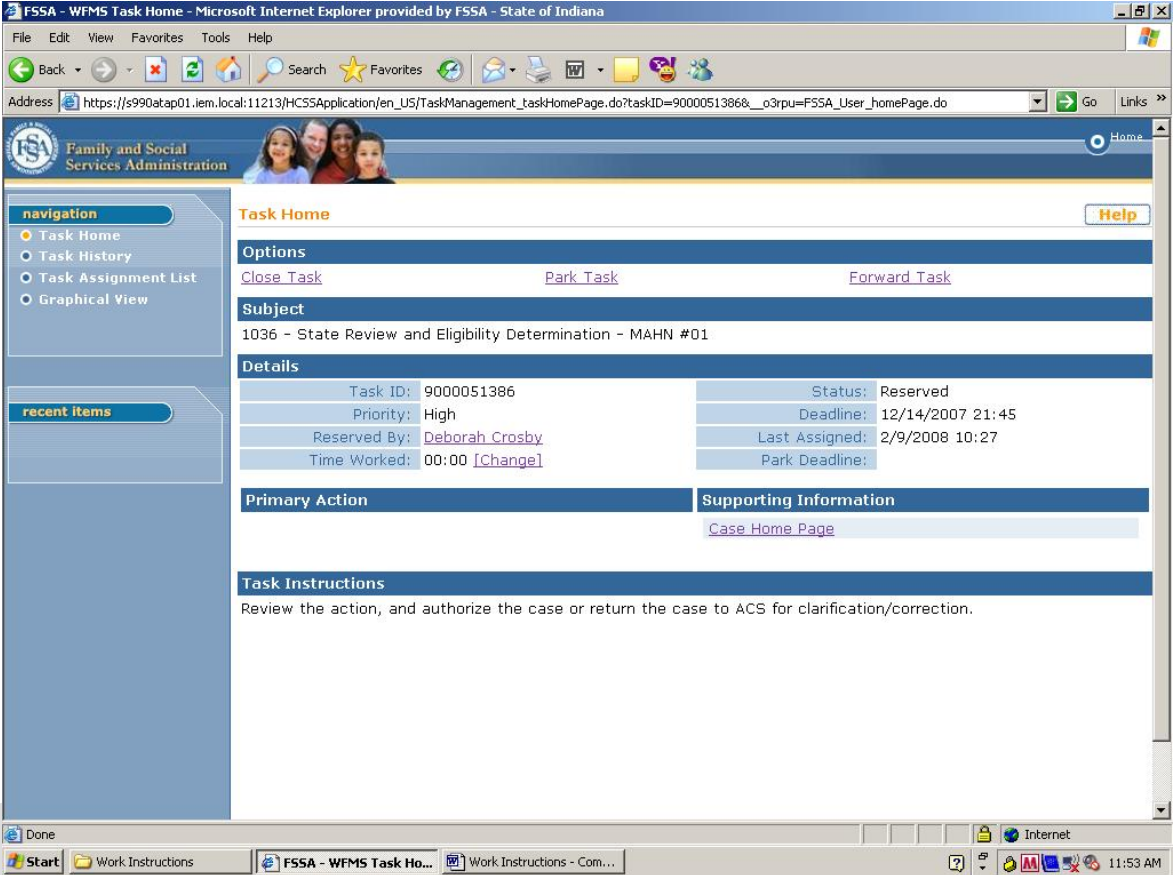
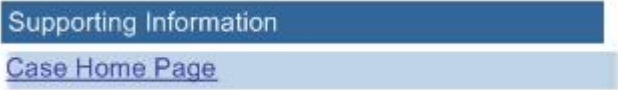
When a user closes a task, the next task is automatically presented under My Tasks on the User Home page. If there are other tasks in the same queue for the same case, those are presented to the user before any tasks unrelated to the current case being processed.

Step	Getting a Task Automatically																					
1.	<p>From the User Home page, view My Tasks and click the <i>Task ID</i> for the first task listed. The system takes you to the Task Home page, where you can view the task instructions and begin processing the task.</p>  <p>The screenshot shows the FSSA Case Management System interface. The 'My Tasks' table is as follows:</p> <table><tr><th>Task</th><th>Case ID</th><th>Document</th><th>Subject</th><th>Status</th><th>Priority</th><th>Due Date</th></tr><tr><td>277</td><td>281</td><td></td><td>New Application ready for Initial Review - 281.</td><td>Open</td><td>Medium</td><td></td></tr><tr><td>279</td><td>283</td><td></td><td>New Application ready for Initial Review - 283.</td><td>Open</td><td>Medium</td><td></td></tr></table>	Task	Case ID	Document	Subject	Status	Priority	Due Date	277	281		New Application ready for Initial Review - 281.	Open	Medium		279	283		New Application ready for Initial Review - 283.	Open	Medium	
Task	Case ID	Document	Subject	Status	Priority	Due Date																
277	281		New Application ready for Initial Review - 281.	Open	Medium																	
279	283		New Application ready for Initial Review - 283.	Open	Medium																	

3.11.1.12 Opening a Task

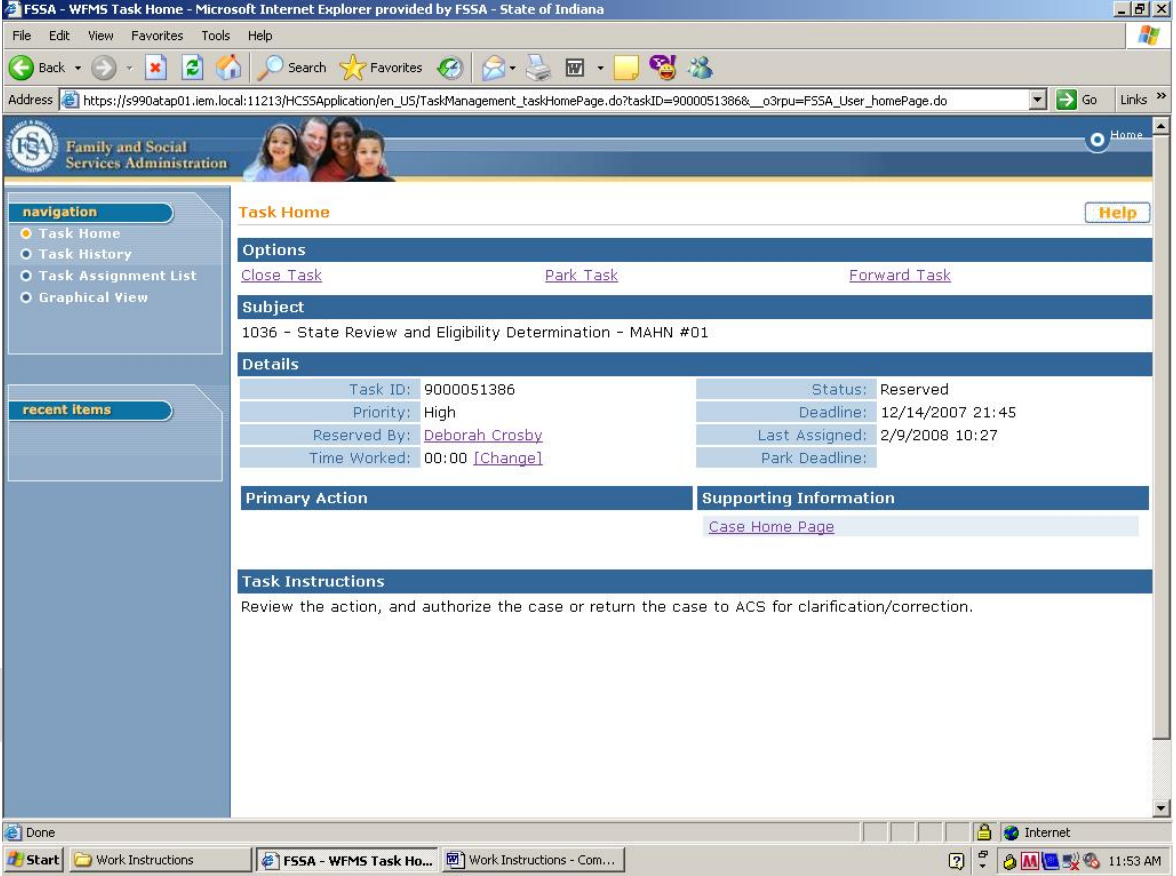
When the user navigates to the User Home page, the first task to be processed is presented at the top of the list under My Tasks. Underneath this task is a list of any parked tasks.

Step	Opening a Task
1.	<p>From the User Home page, under the My Tasks cluster, view the Task's number, Case Primary Client and Task Name. Click the Task's number to open the task.</p>  <p>The WFMS navigates to the Task Home page.</p>

Step	Opening a Task
2.	<p data-bbox="289 243 850 275">View the Primary Action and Task Instructions.</p> 
3.	<p data-bbox="289 1163 1390 1234">Under the Supporting Information cluster, click the <i>Case Home</i> page, <i>Application Case Home</i> page, or another reference link as available or appropriate.</p>  <p data-bbox="289 1373 1399 1440">When you click the applicable link under Supporting Information, the WFMS navigates to that page so that you can begin working on the task.</p>


3.11.1.13 Closing a Task

When a task has been completed in ICES or WFMS, the user must close the task in WFMS. This triggers the next task in the queue to be presented to be worked.

Step	Closing a Task
1.	<p>When the task has been completed, click <i>Task Home</i> to navigate to the Task Home page.</p> 
2.	Under the Options cluster, click <i>Close Task</i> .
3.	The <i>Task Home</i> page of the next available task will appear.

3.11.1.14. Closing Multiple Tasks

Multiple unreserved same-level tasks can be closed from the *Tasks* page, if the tasks have been completed. For example the SEC can close both the *Phone Interview Pending* task and the *AM/PM Callback* task once the interview is completed.

Step	Closing Multiple Tasks																																																
1.	From the <i>Case Home</i> page click on <i>Tasks</i> in the Left Navigation.																																																
2.	<p>Check the appropriate tasks to be closed. Click on <i>Close Selected Tasks</i>.</p> <div> APPLY NOW - 2000095808</div> <p>Tasks: APPLY NOW - 2000095808 Help</p> <div>Create Task Close Selected Tasks</div> <table><thead><tr><th><input type="checkbox"/></th><th></th><th>Task ID</th><th>Subject</th><th>Priority</th><th>Status</th><th>Reserved By</th><th>Deadline</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td></td><td>9000062983</td><td>1082 - Phone Interview Pending for APPLY NOW</td><td>High</td><td>Open</td><td></td><td>1/28/2008 18:32</td></tr><tr><td><input type="checkbox"/></td><td>●</td><td>9000062984</td><td>AM callback</td><td>Medium</td><td>Parked</td><td>dcfssasec</td><td>1/29/2008 13:00</td></tr><tr><td><input type="checkbox"/></td><td>●</td><td>9000062985</td><td>AM callback</td><td>Medium</td><td>Parked</td><td>crosbyd</td><td>1/29/2008 13:00</td></tr><tr><td><input type="checkbox"/></td><td></td><td>9000070914</td><td>Alert Number: 646. EMPLOYMENT BEGAN/ENDED - AEIEI.</td><td>Medium</td><td>Closed</td><td></td><td></td></tr><tr><td><input type="checkbox"/></td><td></td><td>9000071428</td><td>1036 - State Review and Eligibility Determination - ADCR #01, FS #01, MA C #01, MA X #01</td><td>High</td><td>Closed</td><td></td><td></td></tr></tbody></table>	<input type="checkbox"/>		Task ID	Subject	Priority	Status	Reserved By	Deadline	<input type="checkbox"/>		9000062983	1082 - Phone Interview Pending for APPLY NOW	High	Open		1/28/2008 18:32	<input type="checkbox"/>	●	9000062984	AM callback	Medium	Parked	dcfssasec	1/29/2008 13:00	<input type="checkbox"/>	●	9000062985	AM callback	Medium	Parked	crosbyd	1/29/2008 13:00	<input type="checkbox"/>		9000070914	Alert Number: 646. EMPLOYMENT BEGAN/ENDED - AEIEI.	Medium	Closed			<input type="checkbox"/>		9000071428	1036 - State Review and Eligibility Determination - ADCR #01, FS #01, MA C #01, MA X #01	High	Closed		
<input type="checkbox"/>		Task ID	Subject	Priority	Status	Reserved By	Deadline																																										
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<input type="checkbox"/>		9000071428	1036 - State Review and Eligibility Determination - ADCR #01, FS #01, MA C #01, MA X #01	High	Closed																																												
3.	Click <i>Home</i> in the upper right corner to display the User Home page to continue working.																																																

3.11.4 Search Instructions

3.11.4 Overview

Search-related activities may be initiated when applicants, Clients or third parties contact a Call Center, Service Center, State Office or Help Center and request information about a specific case. Document Specialists at the Service Center also use Search activities to attempt to index documents to cases or applications that have been sent without bar codes. These activities may also occur when completing activities related to WFMS work tasks or case processing activities in ICES.

Search activities include:

Searching for a Person

Searching for a Case

Searching for a Non-Indexed Document

Searching for a Task

Searching for an Internal User

[Searching for a Person](#) (insert hyperlink)

[3.11.4.5](#)

[Searching for a Case](#) (insert hyperlink)

[3.11.4.6](#)

[Searching for a Non-Indexed Document](#)(insert hyperlink)

[3.11.4.7](#)

[Searching for a Task](#) (insert hyperlink)

[3.11.4.8](#)

[Searching for an Internal User](#)(insert hyperlink)

[3.11.4.9](#)

3.11.4 .2 Purpose of Searches

The purpose of the search functions is to assist users in processing actions related to cases and Clients by searching for a person, case, document, task and/or user.

In addition to performing searches in WFMS, an ICES search may be needed to determine if an individual is known to ICES. Correctly matching information in ICES is necessary to successfully complete clearance and prevent duplicate RIDS for individuals. A search can not be conducted using the ICES Application number.

3.11.4 .3 Search Results

The system displays a list of results when a search is initiated from any of the search pages (Person, Case, Non-Indexed Document, Internal User or Task). From this list, the user is able to:

Select a specific individual, case, user, task or non-indexed document

View additional details to allow identification of the correct record

When no match is found, the system displays “0 results”.



3.11.4 .4 Best Practice Suggestions

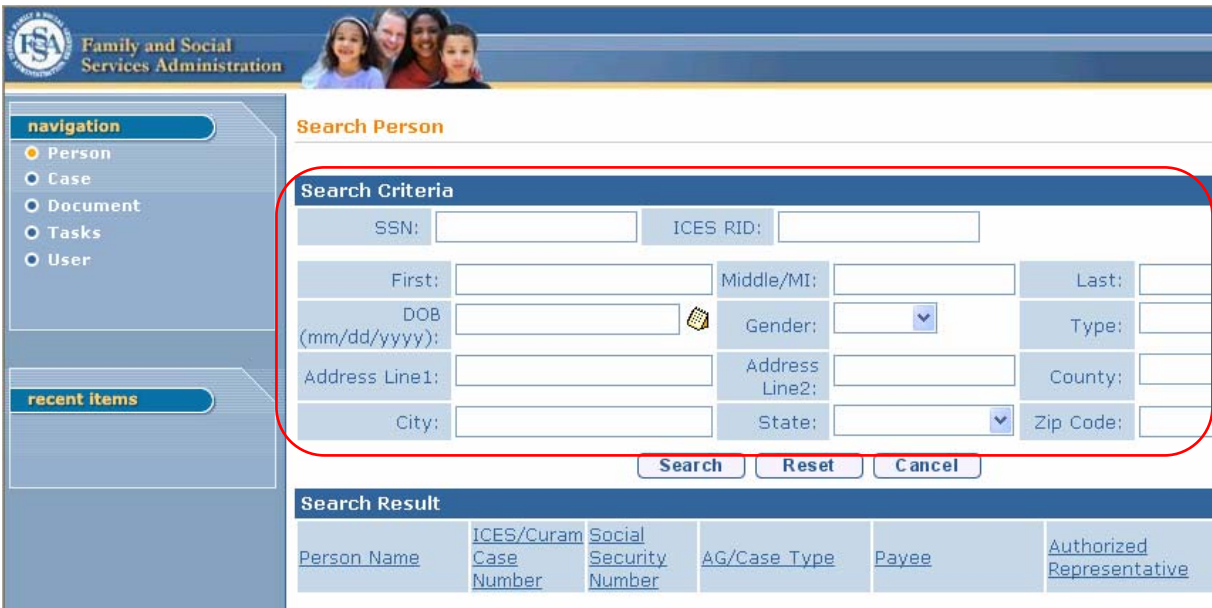
When searching, if a match is not found, repeat the search using fewer search criteria. Entering all possible search criteria may not locate individuals who were initially entered into the system with minimal or incorrect information. For example, if the person’s first name is Conny, use Conn as someone else may have entered it in as “Connie”, “Conni”, or “Conney” and the search results may not find anyone matching the individual if, in the First Name field, Conny is the only name entered for the search. Therefore, depending on search results, enter fewer details and then narrow the search, if necessary. In addition, prior names and addresses should be used when known for additional searches.

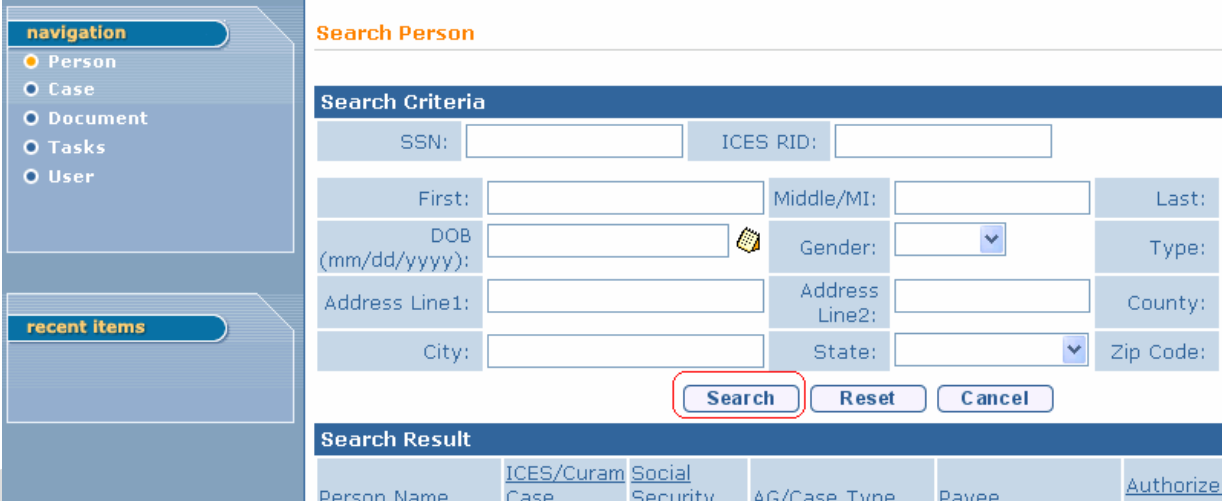
DRAFT

3.11.4.5 Searching for a Person

Searching for a Person is necessary to complete a work task or case processing to determine if a person already exists in the system.

Step	Searching for a Person
1.	<p>Access the Search For option on the Home page in WFMS. Click the <i>Person</i> link.</p>  <p>OR, you may search for a person by clicking the <i>Search</i> option on the left side Navigation bar.</p> 

Step	Searching for a Person																														
2.	<p>When the Search Person is displayed, enter the available identifying information regarding the individual in the search fields.</p>  <p>The following table includes a description of each field on the Person Search page.</p> <table> <tr> <th>Data Element</th><th>Description</th></tr> <tr> <td>ICES RID (Recipient Identification) Number</td><td>12 digits</td></tr> <tr> <td>Social Security Number</td><td>xxx-yy-zzzz</td></tr> <tr> <td>Last Name</td><td>Up to 15 characters</td></tr> <tr> <td>First Name</td><td>Up to 15 characters</td></tr> <tr> <td>Middle/MI</td><td>Up to 1 character</td></tr> <tr> <td>Date of Birth</td><td>mm/dd/yyyy</td></tr> <tr> <td>Gender</td><td>Drop-down box with options: M or F</td></tr> <tr> <td>Address Line 1</td><td></td></tr> <tr> <td>Address Line 2</td><td></td></tr> <tr> <td>City</td><td></td></tr> <tr> <td>State</td><td>Drop down box with State options</td></tr> <tr> <td>Zip Code</td><td>5 digits</td></tr> <tr> <td>County</td><td>Drop down box with options</td></tr> <tr> <td>Type</td><td>Screening Client, Applicant or Client</td></tr> </table>	Data Element	Description	ICES RID (Recipient Identification) Number	12 digits	Social Security Number	xxx-yy-zzzz	Last Name	Up to 15 characters	First Name	Up to 15 characters	Middle/MI	Up to 1 character	Date of Birth	mm/dd/yyyy	Gender	Drop-down box with options: M or F	Address Line 1		Address Line 2		City		State	Drop down box with State options	Zip Code	5 digits	County	Drop down box with options	Type	Screening Client, Applicant or Client
Data Element	Description																														
ICES RID (Recipient Identification) Number	12 digits																														
Social Security Number	xxx-yy-zzzz																														
Last Name	Up to 15 characters																														
First Name	Up to 15 characters																														
Middle/MI	Up to 1 character																														
Date of Birth	mm/dd/yyyy																														
Gender	Drop-down box with options: M or F																														
Address Line 1																															
Address Line 2																															
City																															
State	Drop down box with State options																														
Zip Code	5 digits																														
County	Drop down box with options																														
Type	Screening Client, Applicant or Client																														

Step	Searching for a Person
3.	<p>Conduct a person search using one or more of the following, in the order of preference listed:</p> <ul style="list-style-type: none"> ✓ Social Security Number ✓ ICES RID Number ✓ First and Last Name ✓ Street/Rural Route, City and State Address (to narrow the results include as many address fields as available) ✓ First and Last Name and Address ✓ First and Last Name and Date of Birth <p>Click the <i>Search</i> button on the Search Person page.</p> 

Step**Searching for a Person**

4. A successful Person Search displays a Person Name, ICES/WFMS Case Number, Social Security Number, AG/Case Type, Payee, Authorized Representative and Status that matches the search fields completed.

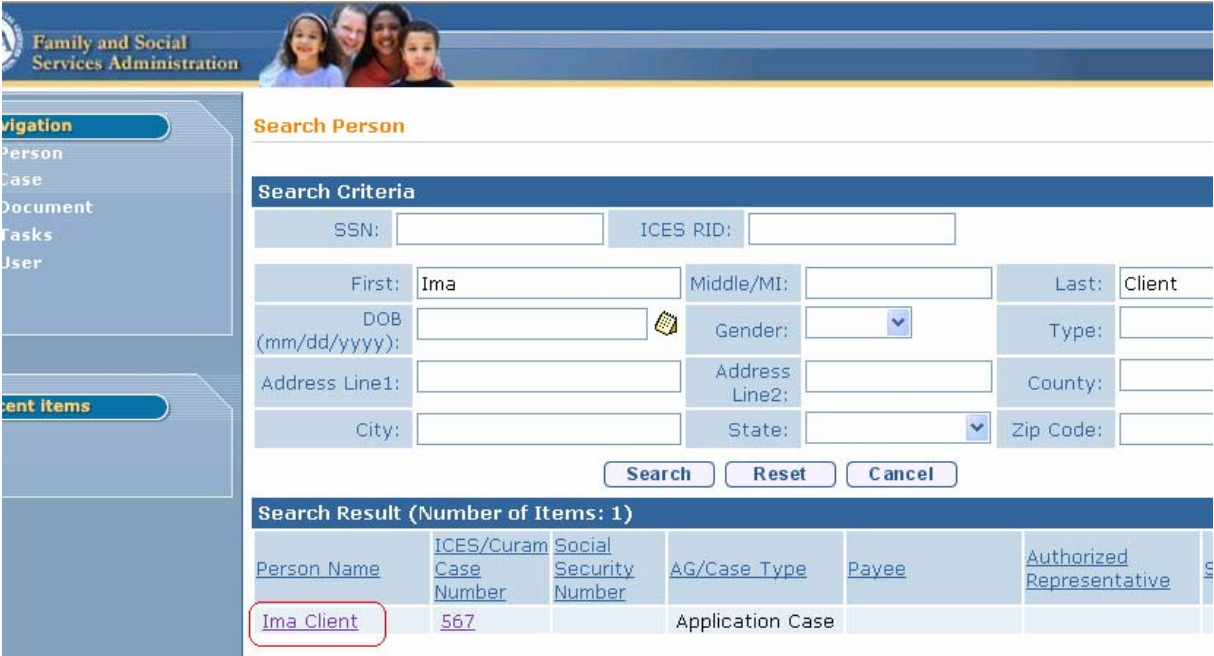
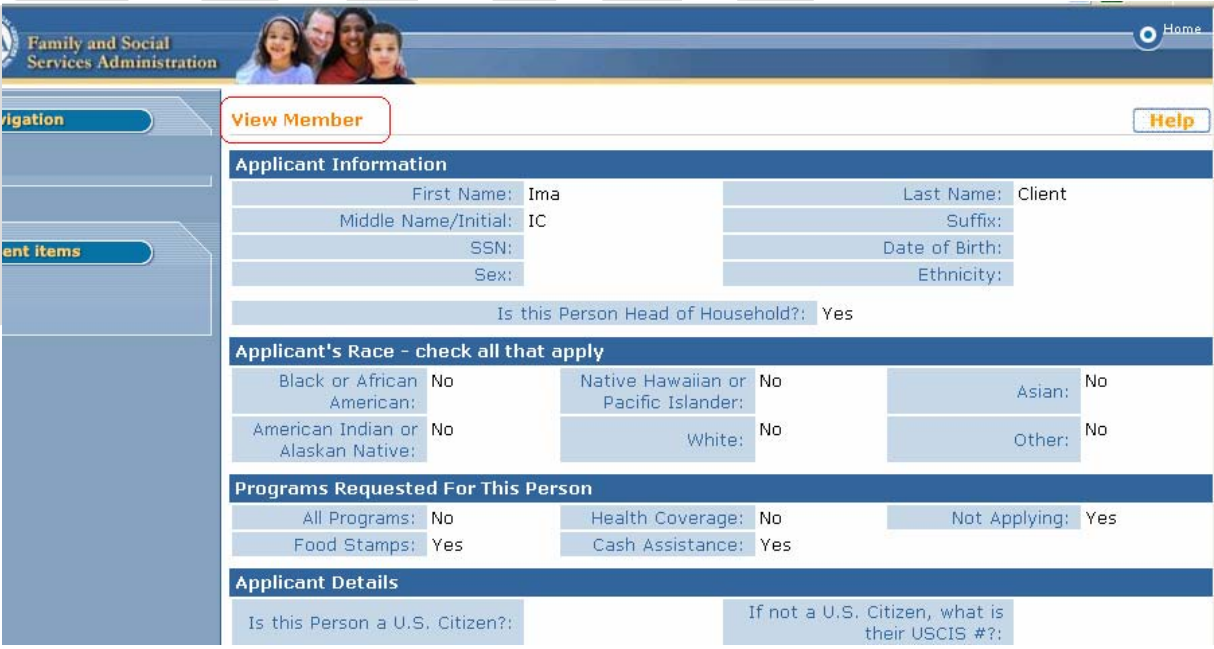
The screenshot shows the 'Search Person' interface. The search criteria are: First: Ima, Middle/MI: (blank), Last: Client, DOB: (blank), Gender: (blank), Type: (blank), Address Line1: (blank), Address Line2: (blank), County: (blank), City: (blank), State: (blank), Zip Code: (blank). The search result is displayed in a table with 7 columns: Person Name, ICES/Curam Case Number, Social Security Number, AG/Case Type, Payee, Authorized Representative, and Status. The result for 'Ima Client' is shown with a Social Security Number of 567 and an AG/Case Type of Application Case.

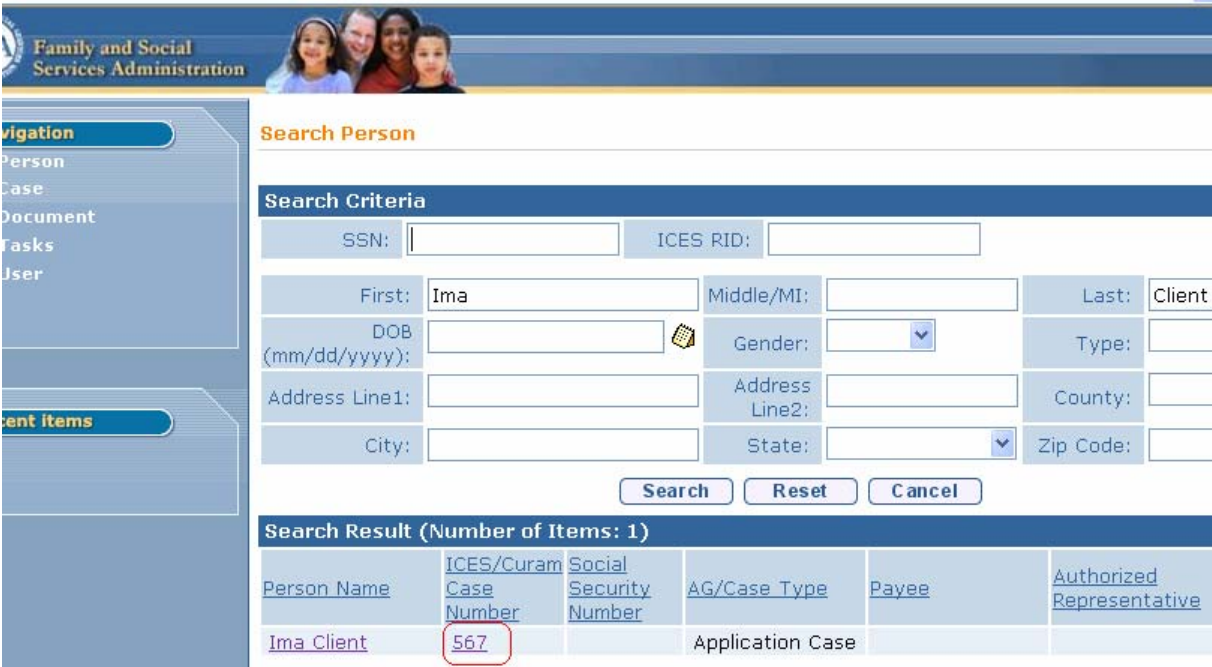
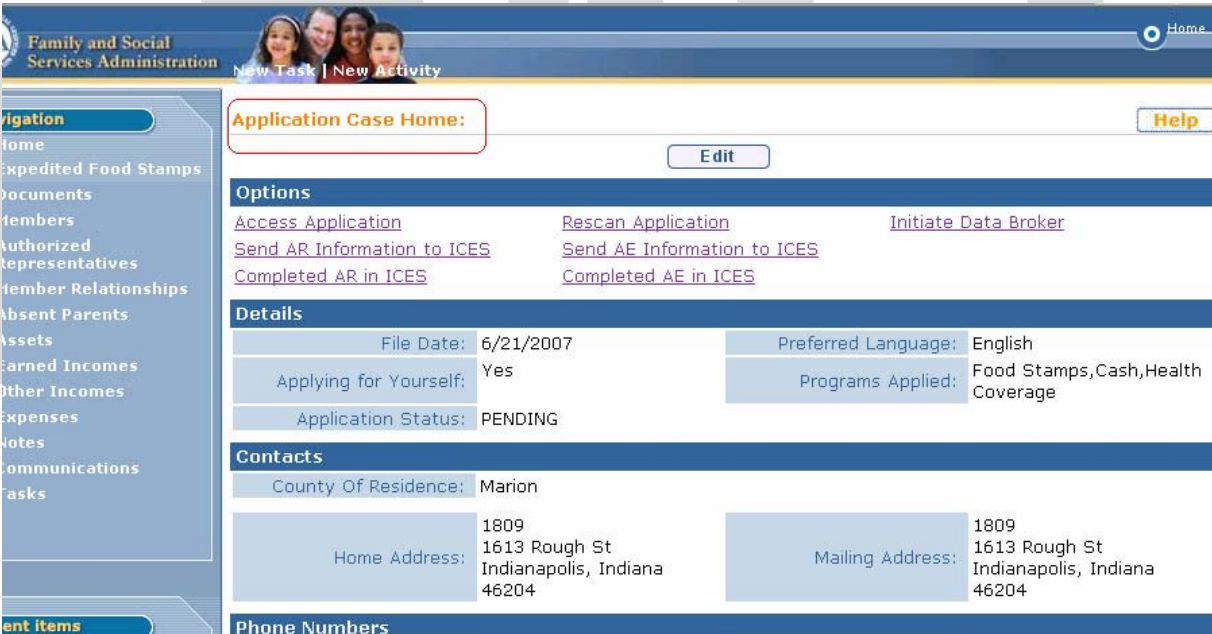
Person Name	ICES/Curam Case Number	Social Security Number	AG/Case Type	Payee	Authorized Representative	Status
Ima Client	567		Application Case			

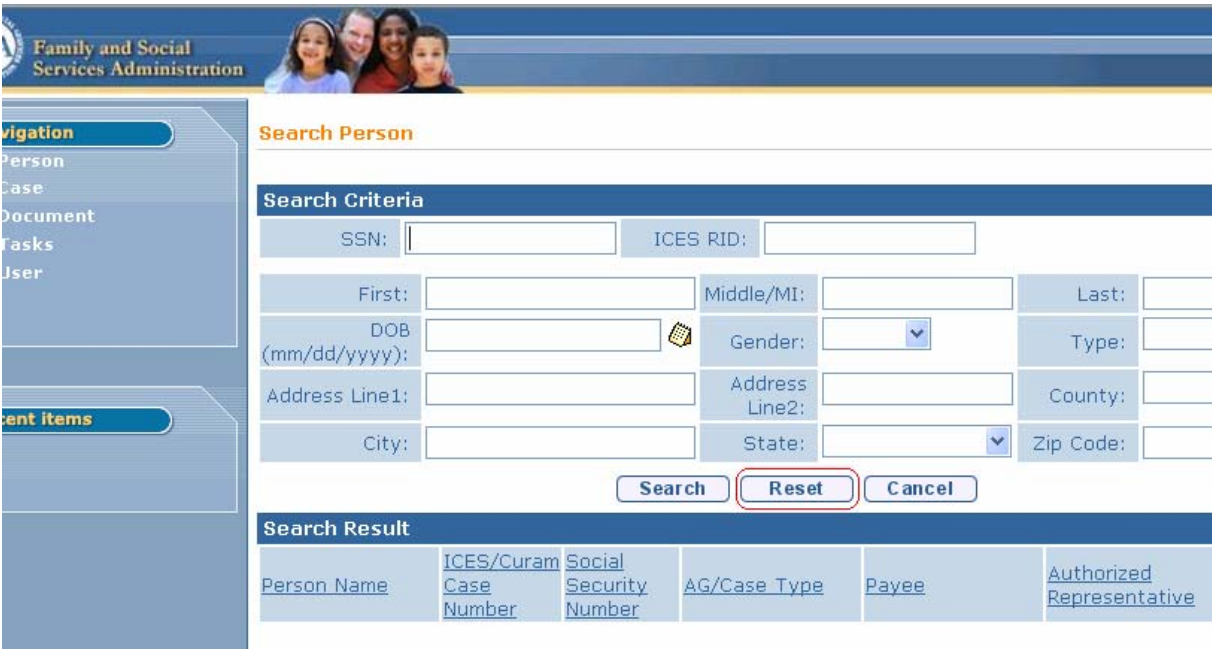
If no match is found, Search Results display “Search Result (Number of Items: 0)” and Information displays “Record(s) cannot be found for the search criteria entered.”

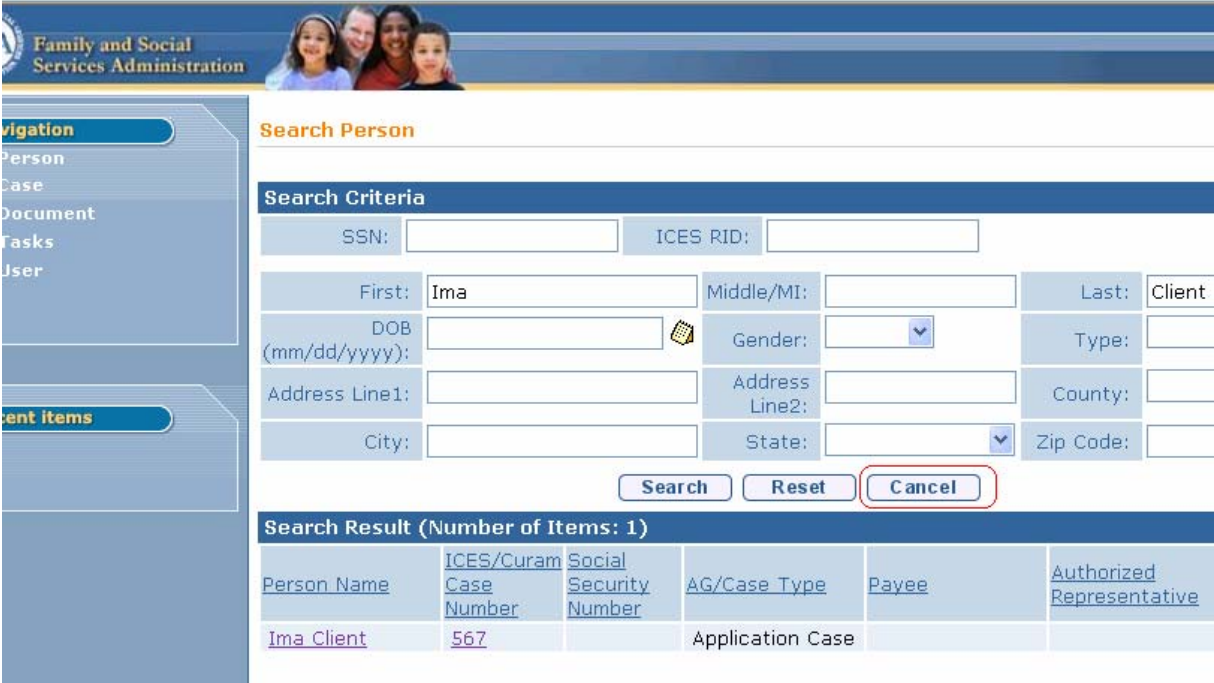
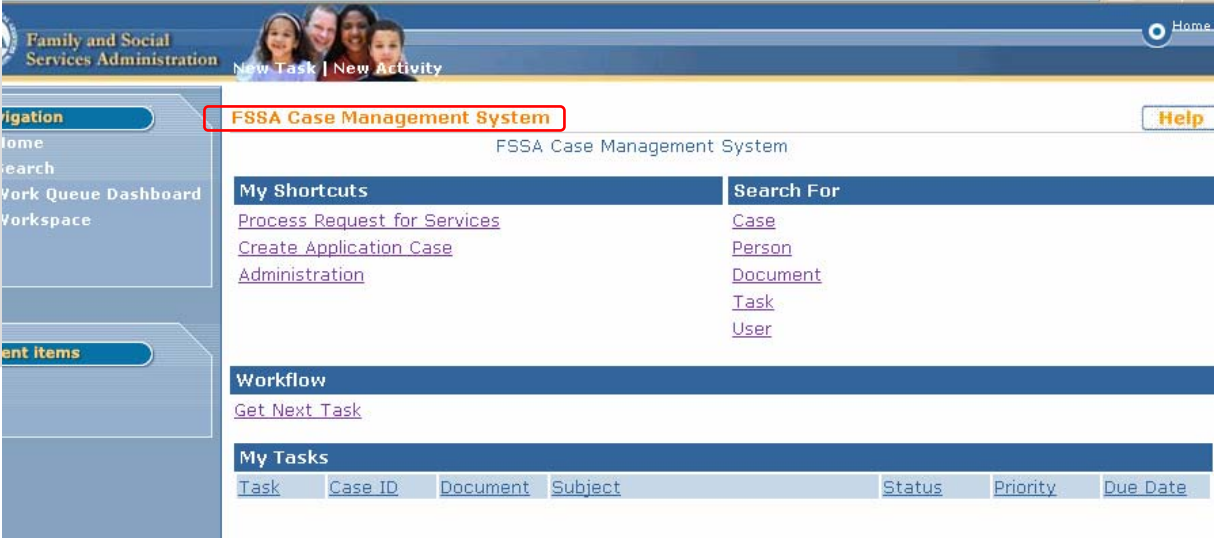
The screenshot shows the 'Search Person' interface with the same search criteria as the previous screenshot. The search result is displayed in a table with 7 columns: Person Name, ICES/Curam Case Number, Social Security Number, AG/Case Type, Payee, Authorized Representative, and Status. The result for 'Ima Client' is shown with a Social Security Number of 567 and an AG/Case Type of Application Case.

Person Name	ICES/Curam Case Number	Social Security Number	AG/Case Type	Payee	Authorized Representative	Status
Ima Client	567		Application Case			

Step	Searching for a Person
5.	<p>From the Search Results, click the link of the person's name that you want to view, or you can click the Case Number that you want to view.</p> <p>To view information about the person, click the link of the name of the person you want to view.</p>  <p>The View Member page displays.</p> 

Step	Searching for a Person
6.	<p>To view information about the case, click the link of the Case Number that you want to view.</p>  <p>The Application Case Home page displays.</p> 

Step	Searching for a Person
7.	<p>To start another Person Search, click the <i>Reset</i> button and the search criteria resets the Person Search page to blank fields.</p> 


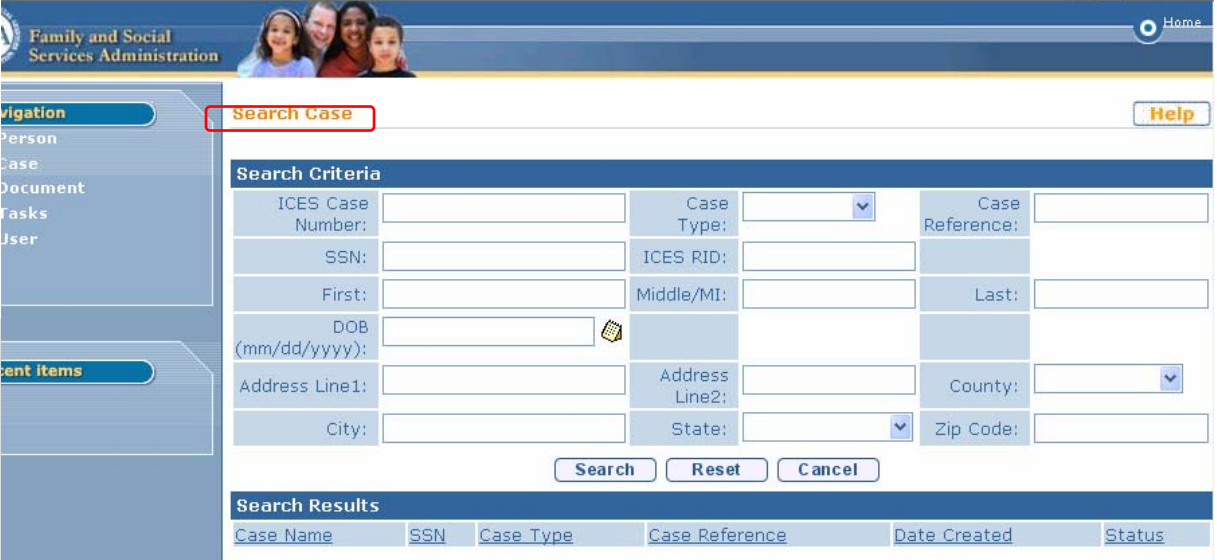
Step	Searching for a Person
8.	<p>To end or cancel a Person Search, click the <i>Cancel</i> button.</p>  <p>The FSSA Case Management System Home page displays.</p> 

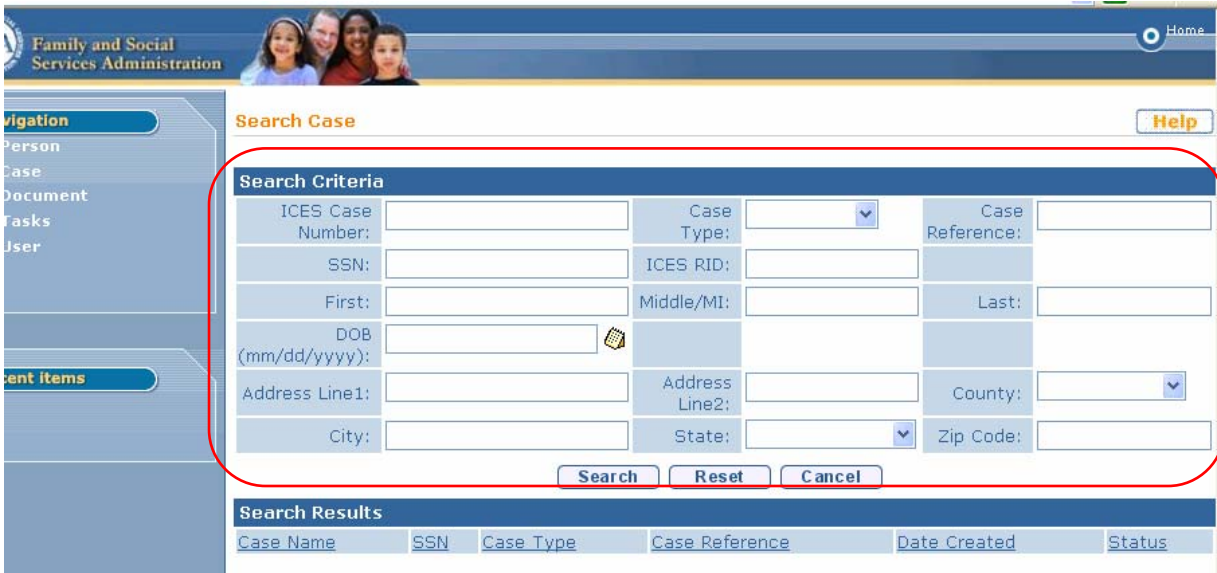
3.11.4.6 Searching for a Case

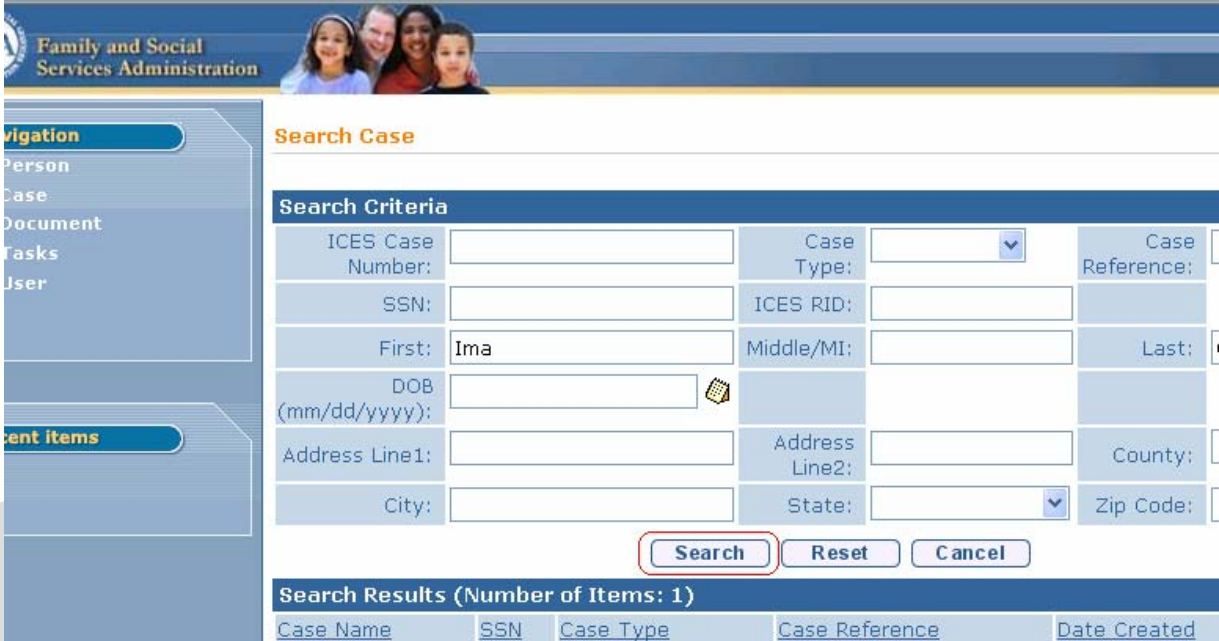
Searching for a case is necessary when you are completing a work task or case processing to determine if a case exists in the system, or to view information that is in a specific case.


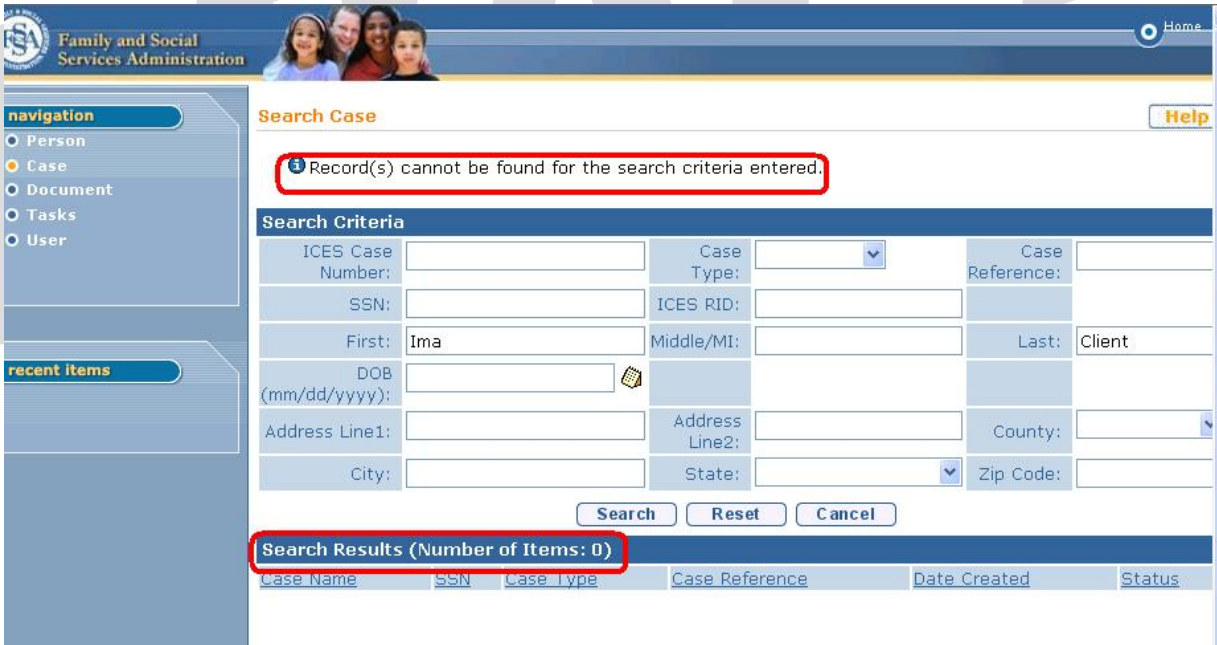
If the case is a State Program which is never entered into the ICES system, the results display as an application, even when case processing is completed.

Steps	Searching for a Case
1.	<p>Access the Search For option on the Home page of the FSSA Case Management System. Click the <i>Case</i> link.</p>  <p>Or, search for a case by clicking the <i>Search</i> option on the left side Navigation bar.</p> 

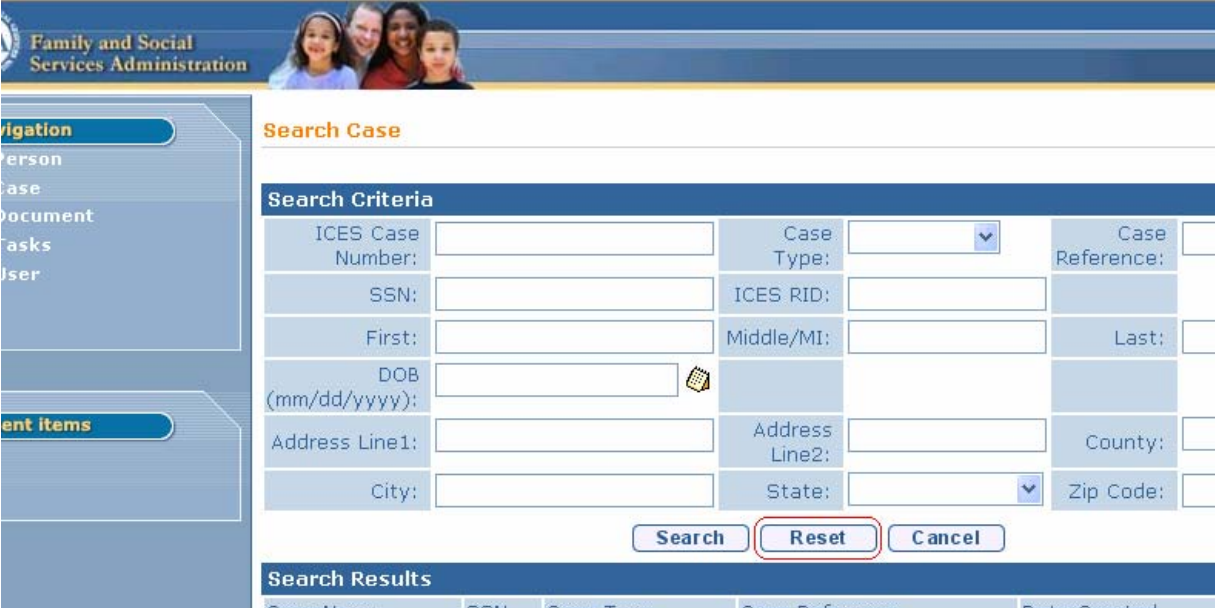
Steps	Searching for a Case
2.	<p>Then, click the <i>Case</i> option on the left side Navigation bar.</p> 
3.	<p>To display the Search Case page, click the Case link on either the Search For option and the Case link, or the Search option on the left side Navigation bar and the Case link.</p> 


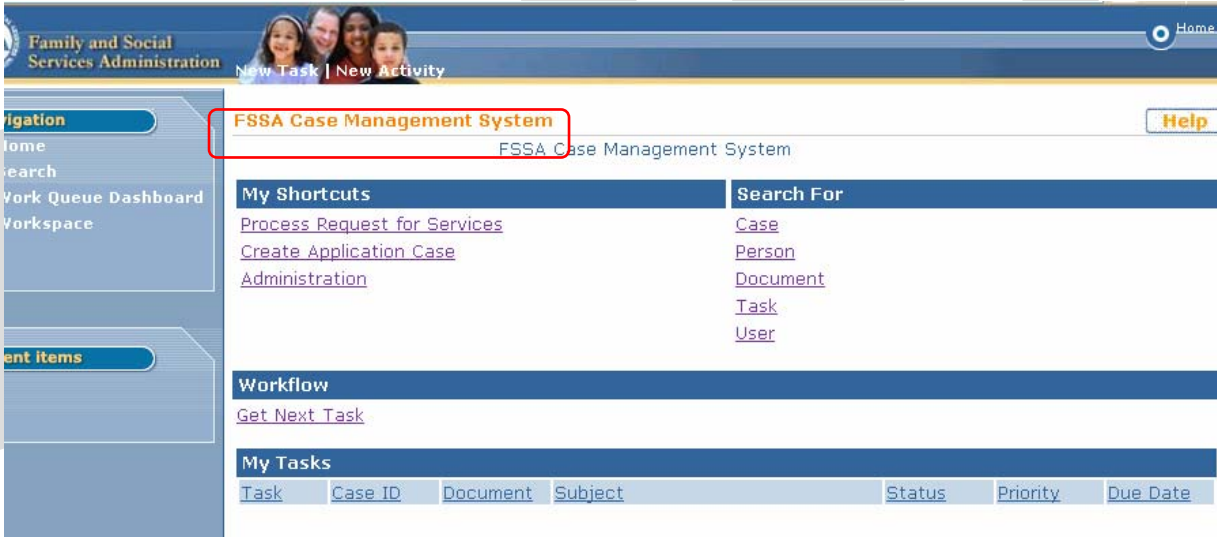
Steps	Searching for a Case																																
4.	<p>Enter available identifying information regarding the case in the search fields.</p>  <p>The following table includes a description of each field on the Case Search page.</p> <table border="1"> <thead> <tr> <th>Data Element</th><th>Description</th></tr> </thead> <tbody> <tr> <td>ICES Case Number</td><td>10 digits</td></tr> <tr> <td>Case Type</td><td>Drop down box options of Screening, Application, Standard</td></tr> <tr> <td>Case Reference</td><td>WFMS Case Number</td></tr> <tr> <td>Social Security Number</td><td>xxx-yy-zzzz</td></tr> <tr> <td>ICES Rid Number</td><td>12 digits</td></tr> <tr> <td>First Name</td><td></td></tr> <tr> <td>Middle/MI</td><td>Up to 1 character</td></tr> <tr> <td>Last Name</td><td></td></tr> <tr> <td>Date of Birth</td><td>Mm/dd/yyyy</td></tr> <tr> <td>Address Line 1</td><td></td></tr> <tr> <td>Address Line 2</td><td>Apartment number</td></tr> <tr> <td>County</td><td></td></tr> <tr> <td>City</td><td></td></tr> <tr> <td>State</td><td>Drop down box with state options</td></tr> <tr> <td>Zip Code</td><td></td></tr> </tbody> </table>	Data Element	Description	ICES Case Number	10 digits	Case Type	Drop down box options of Screening, Application, Standard	Case Reference	WFMS Case Number	Social Security Number	xxx-yy-zzzz	ICES Rid Number	12 digits	First Name		Middle/MI	Up to 1 character	Last Name		Date of Birth	Mm/dd/yyyy	Address Line 1		Address Line 2	Apartment number	County		City		State	Drop down box with state options	Zip Code	
Data Element	Description																																
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Middle/MI	Up to 1 character																																
Last Name																																	
Date of Birth	Mm/dd/yyyy																																
Address Line 1																																	
Address Line 2	Apartment number																																
County																																	
City																																	
State	Drop down box with state options																																
Zip Code																																	

Steps	Searching for a Case
5.	<p>Conduct a case search using one or more of the following in the order of preference listed:</p> <ul style="list-style-type: none"> ✓ Case Number (WFMS or ICES) ✓ Social Security Number of an individual potentially associated with the WFMS Case ✓ ICES RID Number of an individual potentially associated with the WFMS Case ✓ First and Last Name and Date of Birth of an individual potentially associated with the WFMS Case ✓ First and Last Name of an individual potentially associated with the WFMS Case ✓ Case type, which is a drop down box option of Screening, Application, or Standard <p>Enter the information regarding the case, and click the <i>Search</i> button on the Search Case page.</p> 

Steps	Searching for a Case
6.	<p>A successful Case Search displays the Case Name, Date of Birth, SSN, Case Type, Case Reference Number(WFMS), ICES Case Number, Date Created (in WFMS), and the Status of the case that match the search fields completed.</p>  <p>The screenshot shows the 'Search Case' page with the following search criteria: ICES Case Number (empty), Case Type (dropdown), Case Reference (empty), SSN (empty), ICES RID (empty), First (Ima), Middle/MI (empty), Last (Client), DOB (mm/dd/yyyy) (empty), Address Line1 (empty), Address Line2 (empty), County (dropdown), City (empty), State (dropdown), and Zip Code (empty). The search results table shows one result: Ima Client, Application, 567, 6/21/2007, Open.</p> <p>If no match is found, Search Results displays “Search Results (Number of Items: 0)” and Information displays “Record(s) cannot be found for the search criteria entered.”</p>  <p>The screenshot shows the 'Search Case' page with the same search criteria as above. The search results table shows zero results. A message at the top of the results section states: 'Record(s) cannot be found for the search criteria entered.'</p>

Steps	Searching for a Case																																																																
7.	<div>Click the link of the person's name that you want to view.</div> <div><div><div><div><div><div>Family and Social Services Administration</div><div><div>Navigation</div><div>Person</div><div>Case</div><div>Document</div><div>Tasks</div><div>User</div></div><div>Recent items</div></div></div><div><div><div>Search Case</div><div><div>Search Criteria</div><table><tr><td>ICES Case Number:</td><td><input type="text"/></td><td>Case Type:</td><td><div><div></div></div></td><td>Case Reference:</td><td><input type="text"/></td></tr><tr><td>SSN:</td><td><input type="text"/></td><td>ICES RID:</td><td><input type="text"/></td><td></td><td></td></tr><tr><td>First:</td><td>Ima</td><td>Middle/MI:</td><td><input type="text"/></td><td>Last:</td><td>Client</td></tr><tr><td>DOB (mm/dd/yyyy):</td><td><input type="text"/></td><td></td><td></td><td></td><td></td></tr><tr><td>Address Line1:</td><td><input type="text"/></td><td>Address Line2:</td><td><input type="text"/></td><td>County:</td><td><input type="text"/></td></tr><tr><td>City:</td><td><input type="text"/></td><td>State:</td><td><div><div></div></div></td><td>Zip Code:</td><td><input type="text"/></td></tr></table><div><div>Search</div><div>Reset</div><div>Cancel</div></div><div><div>Search Results (Number of Items: 1)</div><table><tr><th>Case Name</th><th>SSN</th><th>Case Type</th><th>Case Reference</th><th>Date Created</th></tr><tr><td>Ima Client</td><td></td><td>Application</td><td>567</td><td>6/21/2007</td></tr></table></div></div></div></div></div><div>The Case Home page displays.</div><div><div><div><div><div><div>Family and Social Services Administration</div><div><div>Navigation</div><div>Home</div><div>Expedited Food Stamps</div><div>Documents</div><div>Members</div><div>Authorized representatives</div><div>Member Relationships</div><div>Absent Parents</div><div>Assets</div><div>Earned Incomes</div><div>Other Incomes</div><div>Expenses</div><div>Notes</div><div>Communications</div><div>Tasks</div></div><div>Recent items</div></div></div><div><div><div>Application Case Home:</div><div><div>Edit</div><div>Help</div></div><div><div>Options</div><div><div><div><div>Access Application</div><div>Send AR Information to ICES</div><div>Completed AR in ICES</div></div><div><div>Rescan Application</div><div>Send AE Information to ICES</div><div>Completed AE in ICES</div></div><div><div>Initiate Data Broker</div></div></div></div><div><div>Details</div><table><tr><td>File Date:</td><td>6/21/2007</td><td>Preferred Language:</td><td>English</td></tr><tr><td>Applying for Yourself:</td><td>Yes</td><td>Programs Applied:</td><td>Food Stamps,Cash,Health Coverage</td></tr><tr><td>Application Status:</td><td>PENDING</td><td></td><td></td></tr></table></div><div><div>Contacts</div><table><tr><td>County Of Residence:</td><td>Marion</td></tr><tr><td>Home Address:</td><td>1809 1613 Rough St Indianapolis, Indiana 46204</td><td>Mailing Address:</td><td>1809 1613 Rough St Indianapolis, Indiana 46204</td></tr></table></div><div><div>Phone Numbers</div></div></div></div></div></div></div></div></div></div>	ICES Case Number:	<input type="text"/>	Case Type:	<div><div></div></div>	Case Reference:	<input type="text"/>	SSN:	<input type="text"/>	ICES RID:	<input type="text"/>			First:	Ima	Middle/MI:	<input type="text"/>	Last:	Client	DOB (mm/dd/yyyy):	<input type="text"/>					Address Line1:	<input type="text"/>	Address Line2:	<input type="text"/>	County:	<input type="text"/>	City:	<input type="text"/>	State:	<div><div></div></div>	Zip Code:	<input type="text"/>	Case Name	SSN	Case Type	Case Reference	Date Created	Ima Client		Application	567	6/21/2007	File Date:	6/21/2007	Preferred Language:	English	Applying for Yourself:	Yes	Programs Applied:	Food Stamps,Cash,Health Coverage	Application Status:	PENDING			County Of Residence:	Marion	Home Address:	1809 1613 Rough St Indianapolis, Indiana 46204	Mailing Address:	1809 1613 Rough St Indianapolis, Indiana 46204
ICES Case Number:	<input type="text"/>	Case Type:	<div><div></div></div>	Case Reference:	<input type="text"/>																																																												
SSN:	<input type="text"/>	ICES RID:	<input type="text"/>																																																														
First:	Ima	Middle/MI:	<input type="text"/>	Last:	Client																																																												
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Address Line1:	<input type="text"/>	Address Line2:	<input type="text"/>	County:	<input type="text"/>																																																												
City:	<input type="text"/>	State:	<div><div></div></div>	Zip Code:	<input type="text"/>																																																												
Case Name	SSN	Case Type	Case Reference	Date Created																																																													
Ima Client		Application	567	6/21/2007																																																													
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County Of Residence:	Marion																																																																
Home Address:	1809 1613 Rough St Indianapolis, Indiana 46204	Mailing Address:	1809 1613 Rough St Indianapolis, Indiana 46204																																																														

Steps	Searching for a Case
8.	<p data-bbox="256 243 1458 306">To start another Case Search, click the <i>Reset</i> button and the search criteria resets the Case Search page to blank fields.</p> 

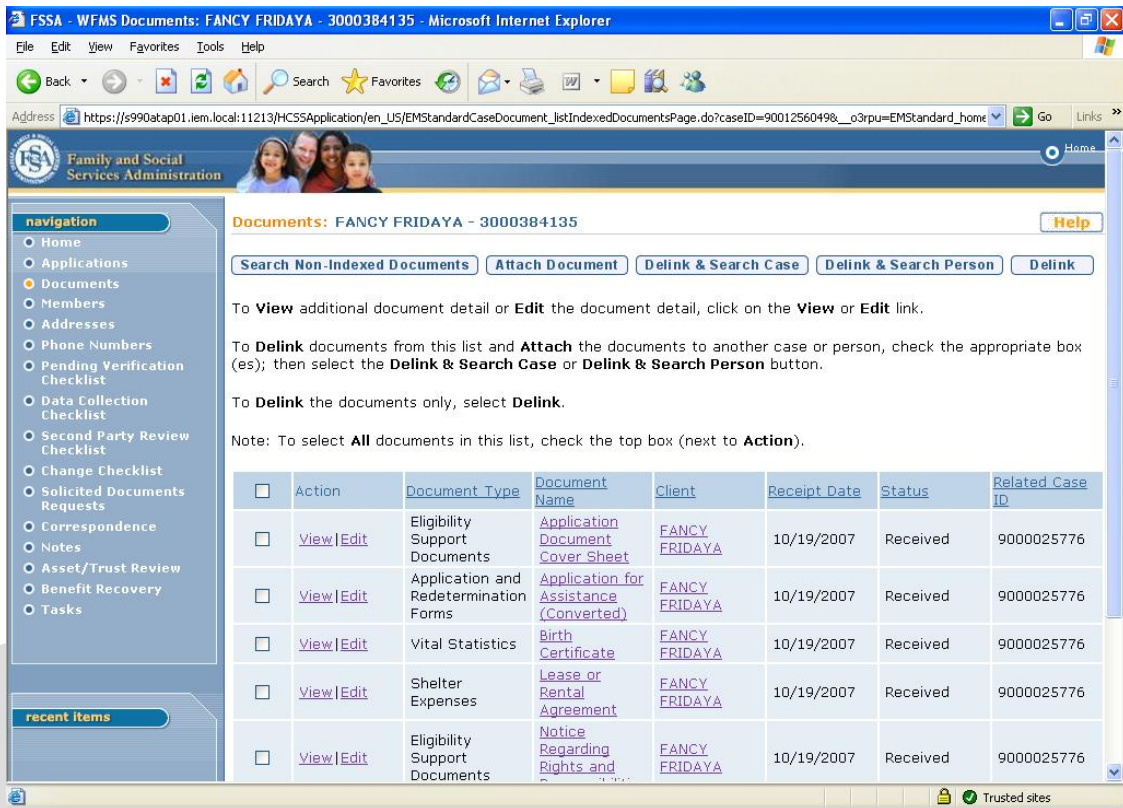
Steps	Searching for a Case
9.	<p>To end or cancel a Case Search, click the <i>Cancel</i> button.</p>  <p>The FSSA Case Management System Home page displays.</p> 

3.11.4.7 Searching for a Non-Indexed Document

The purpose of this search is to locate a submitted document that is not indexed to a case and, upon locating the document, index the document to the correct WFMS case. Non-indexed documents are maintained in a repository of Non-Indexed documents.

This search may occur at multiple points during application, re-determination and reported change processing; or other Client or eligibility related processing.

Most document searches conducted by the SEC will be from Documents in the WFMS Standard Case.

Step	Searching for a Non-Indexed Document																																																
1.	<p>From the WFMS case click <i>Documents</i> in the left Navigation bar and then Search Non-Indexed Documents to search for the document, which may have been submitted without a bar-coded cover sheet and could not be indexed to the case.</p>  <p>Documents: FANCY FRIDAYA - 3000384135</p> <p>Search Non-Indexed Documents Attach Document Delink & Search Case Delink & Search Person Delink</p> <p>To View additional document detail or Edit the document detail, click on the View or Edit link.</p> <p>To Delink documents from this list and Attach the documents to another case or person, check the appropriate box (es); then select the Delink & Search Case or Delink & Search Person button.</p> <p>To Delink the documents only, select Delink.</p> <p>Note: To select All documents in this list, check the top box (next to Action).</p> <table><thead><tr><th><input type="checkbox"/></th><th>Action</th><th>Document Type</th><th>Document Name</th><th>Client</th><th>Receipt Date</th><th>Status</th><th>Related Case ID</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Eligibility Support Documents</td><td>Application Document Cover Sheet</td><td>FANCY FRIDAYA</td><td>10/19/2007</td><td>Received</td><td>9000025776</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Application and Redetermination Forms</td><td>Application for Assistance (Converted)</td><td>FANCY FRIDAYA</td><td>10/19/2007</td><td>Received</td><td>9000025776</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Vital Statistics</td><td>Birth Certificate</td><td>FANCY FRIDAYA</td><td>10/19/2007</td><td>Received</td><td>9000025776</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Shelter Expenses</td><td>Lease or Rental Agreement</td><td>FANCY FRIDAYA</td><td>10/19/2007</td><td>Received</td><td>9000025776</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Eligibility Support Documents</td><td>Notice Regarding Rights and</td><td>FANCY FRIDAYA</td><td>10/19/2007</td><td>Received</td><td>9000025776</td></tr></tbody></table>	<input type="checkbox"/>	Action	Document Type	Document Name	Client	Receipt Date	Status	Related Case ID	<input type="checkbox"/>	View Edit	Eligibility Support Documents	Application Document Cover Sheet	FANCY FRIDAYA	10/19/2007	Received	9000025776	<input type="checkbox"/>	View Edit	Application and Redetermination Forms	Application for Assistance (Converted)	FANCY FRIDAYA	10/19/2007	Received	9000025776	<input type="checkbox"/>	View Edit	Vital Statistics	Birth Certificate	FANCY FRIDAYA	10/19/2007	Received	9000025776	<input type="checkbox"/>	View Edit	Shelter Expenses	Lease or Rental Agreement	FANCY FRIDAYA	10/19/2007	Received	9000025776	<input type="checkbox"/>	View Edit	Eligibility Support Documents	Notice Regarding Rights and	FANCY FRIDAYA	10/19/2007	Received	9000025776
<input type="checkbox"/>	Action	Document Type	Document Name	Client	Receipt Date	Status	Related Case ID																																										
<input type="checkbox"/>	View Edit	Eligibility Support Documents	Application Document Cover Sheet	FANCY FRIDAYA	10/19/2007	Received	9000025776																																										
<input type="checkbox"/>	View Edit	Application and Redetermination Forms	Application for Assistance (Converted)	FANCY FRIDAYA	10/19/2007	Received	9000025776																																										
<input type="checkbox"/>	View Edit	Vital Statistics	Birth Certificate	FANCY FRIDAYA	10/19/2007	Received	9000025776																																										
<input type="checkbox"/>	View Edit	Shelter Expenses	Lease or Rental Agreement	FANCY FRIDAYA	10/19/2007	Received	9000025776																																										
<input type="checkbox"/>	View Edit	Eligibility Support Documents	Notice Regarding Rights and	FANCY FRIDAYA	10/19/2007	Received	9000025776																																										
	<ul style="list-style-type: none">Search using Client Social Security Number, name and address or name only, without selecting document type so that the search is performed for all documents. If the search result is too large, narrow the search criteria by entering the specific document type. <p>Also, consider searching common names by using alternate name spellings. For example, if Client name is Michael Smith, also search using Mike Smith or M Smith.</p>																																																
2.	<p>The system displays the search results. If any documents are found, click the <i>Document Name</i> hyperlink in the Document column of the Search Results. View the document image itself by clicking the <i>Document Name</i> link. View the document image alongside the View Non-Indexed Document Details.</p>																																																

Step

Searching for a Non-Indexed Document

Document Search

TEENY ME - 3000380596

Help

Search Criteria

Document Type: Shelter Expenses

Document: Rent Receipt

Receipt Date From:

Receipt Date Through:

SSN: (Don't enter dashes)

Scan Date:

Client:

Client First Name:

Client Last Name:

Address Line1:

Address Line2:

City:

State:

Zip Code:

Search

Reset

Cancel

Search Results (Number of Items: 10)

Action	Document Type	Document	Client	Receipt Date	Status
Link	Shelter Expenses	Rent Receipt	jane hudson	10/10/2007	Received
Link	Shelter Expenses	Rent Receipt		10/10/2007	Received
Link	Shelter Expenses	Rent Receipt		10/10/2007	Received
Link	Shelter Expenses	Rent Receipt		10/10/2007	Received
Link	Shelter Expenses	Rent Receipt	summer flowers	10/11/2007	Received

3.

Review the identifying information on the document, and determine if it should be linked to the case being worked.

If so, click the *Link* button.

Zip Code:

Search

Reset

Done

Search Results (Number of Items: 3)

Action	Document Type	Document	Client	Receipt Date	Status
Link	Vital Statistics	Birth Certificate	James Smith	6/14/2006	Accepted
Link	Vital Statistics	Birth Certificate	John Smith	6/14/2006	Not Accepted
Link	Vital Statistics	Birth Certificate	Linda Smith	6/14/2006	Received

The system adds the document to the documents list for the case and navigates back to the Documents page.

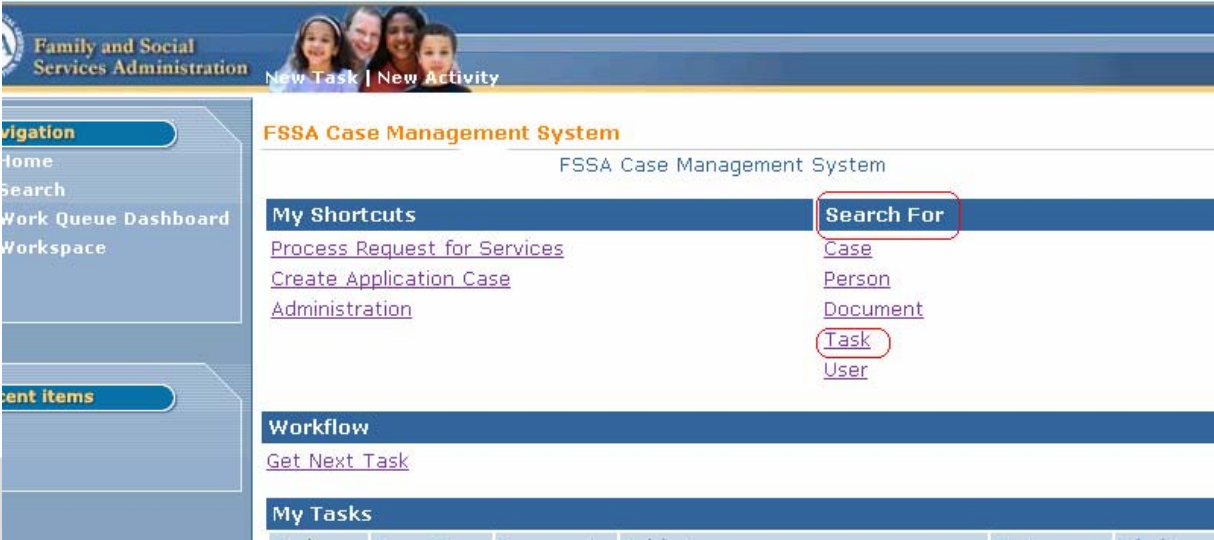

Process the document.


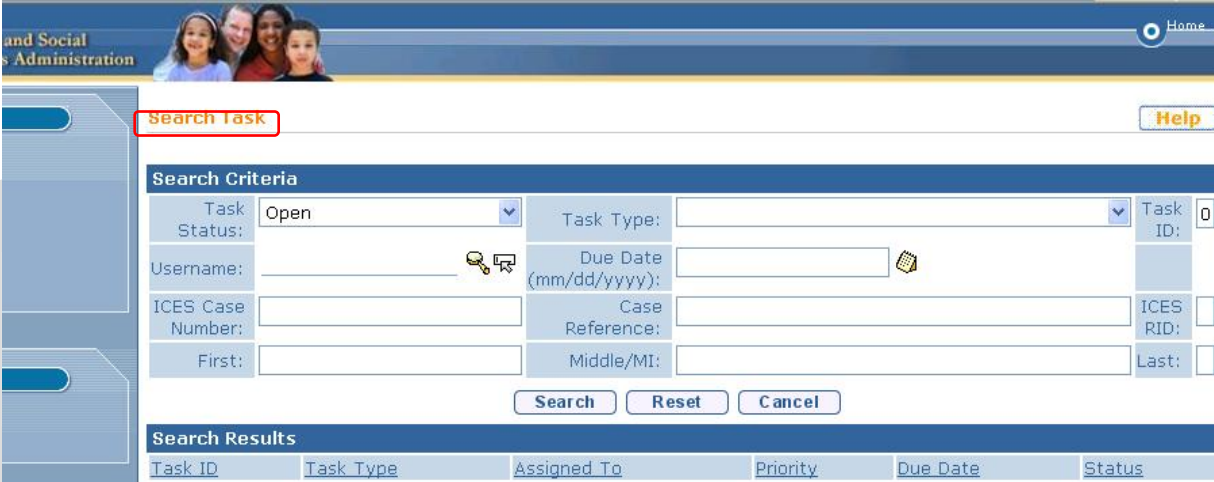
Repeat the process if additional solicited documents are outstanding, and the search results show more than one document.

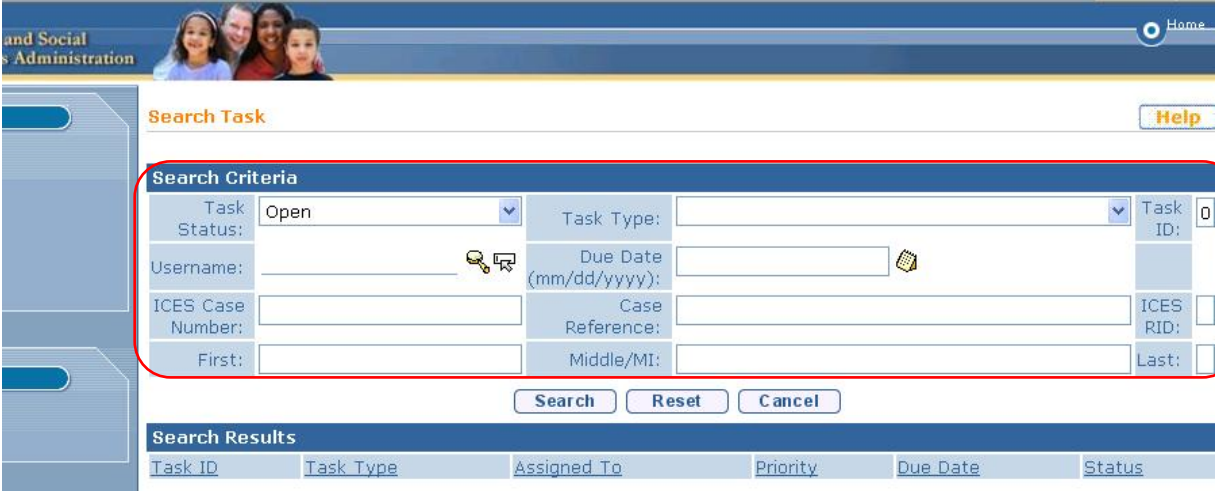
3.11.4.8 Task Search

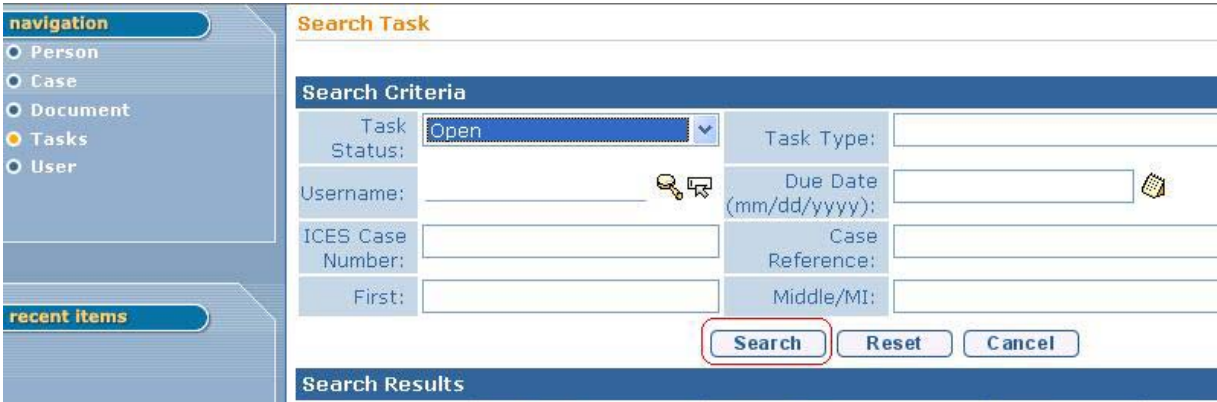
The purpose of this search is to locate a task or tasks associated with an individual or case. This search may also occur if a listing of a specific task type is needed for multiple cases or individuals.

A task search should be completed when processing any workflow task to see if there are any other related tasks that can be processed at the same time. Since ICES Alerts will be Tasks, a Task Search should be conducted before case processing is completed.

Steps	Searching for a Task
1.	<p>Access the Search For option on the Home page in the FSSA Case Management System. Click the <i>Task</i> link.</p>  <p>Or, you may search for a task by clicking the <i>Search</i> option in the left side Navigation bar.</p> 

Steps	Searching for a Task
2.	<p data-bbox="256 247 574 275">Then click the <i>Task</i> option.</p> 
3.	<p data-bbox="256 840 1463 905">Clicking either the Search For option and the Task link or the Search option on the left side Navigation bar and the Task option display the Search Task page.</p> 

Steps	Searching for a Task																								
4.	<p>Enter identifying information available regarding an individual or case that is potentially associated with the task in question in the Search Criteria fields.</p>  <p>The following table contains a description of each field on the Search Task page.</p> <table> <tr> <th>Data Element</th><th>Description</th></tr> <tr> <td>Task Status</td><td>Drop-down option box Requires either the first and last name of the Client or the ICES Case Number or Case Reference Number</td></tr> <tr> <td>Task Type</td><td>Drop-down option box Requires either the first and last name of the Client or the ICES Case Number or Case Reference Number</td></tr> <tr> <td>Task ID</td><td></td></tr> <tr> <td>Username</td><td></td></tr> <tr> <td>Due Date</td><td></td></tr> <tr> <td>ICES Case Number</td><td>10 digits</td></tr> <tr> <td>Curam Case Reference Number</td><td></td></tr> <tr> <td>ICES RID Number</td><td>12 digits</td></tr> <tr> <td>First Name</td><td>Up to _____ characters</td></tr> <tr> <td>Middle Initial</td><td>1 character</td></tr> <tr> <td>Last Name</td><td>Up to _____ characters</td></tr> </table>	Data Element	Description	Task Status	Drop-down option box Requires either the first and last name of the Client or the ICES Case Number or Case Reference Number	Task Type	Drop-down option box Requires either the first and last name of the Client or the ICES Case Number or Case Reference Number	Task ID		Username		Due Date		ICES Case Number	10 digits	Curam Case Reference Number		ICES RID Number	12 digits	First Name	Up to _____ characters	Middle Initial	1 character	Last Name	Up to _____ characters
Data Element	Description																								
Task Status	Drop-down option box Requires either the first and last name of the Client or the ICES Case Number or Case Reference Number																								
Task Type	Drop-down option box Requires either the first and last name of the Client or the ICES Case Number or Case Reference Number																								
Task ID																									
Username																									
Due Date																									
ICES Case Number	10 digits																								
Curam Case Reference Number																									
ICES RID Number	12 digits																								
First Name	Up to _____ characters																								
Middle Initial	1 character																								
Last Name	Up to _____ characters																								

Steps	Searching for a Task
5.	<p>Conduct a task search using one or more of the following in the order of preference listed:</p> <ul style="list-style-type: none"> ✓ WFMS Case Number ✓ ICES Case Number ✓ ICES RID number ✓ Task Type ✓ Task Status ✓ Last Name ✓ First Name ✓ WFMS Task ID <p>Click the <i>Search</i> button.</p> 



Steps	Searching for a Task												
6.	<p>A successful Task Search displays the Task ID, Task Type, Assigned To, Priority, Due Date and Status of the Task you are searching for.</p> <div><div><div>Search</div><div>Reset</div><div>Cancel</div></div><table><tr><td>Task ID</td><td>Task Type</td><td>Assigned To</td><td>Priority</td><td>Due Date</td><td>Status</td></tr><tr><td>12345</td><td>Process Application</td><td>Jo Daniels</td><td>Medium</td><td>03/04/2007</td><td>Open</td></tr></table></div> <ul style="list-style-type: none">Clicking the Task ID navigates the user to view the task.If no match is found, Search Results displays “Search Results (number of Items: 0)” and Information displays “Record(s) cannot be found for the search criteria entered.” <div><div><div><div><div><div>Family and Social Services Administration</div><div>Home</div></div><div><div>navigation</div><div><div>Person</div><div>Case</div><div>Document</div><div>Tasks</div><div>User</div></div><div><div>recent items</div></div></div><div><div>Search Task</div><div><div>Record(s) cannot be found for the search criteria entered.</div><div><div>Search Criteria</div><div><div>Task Status:Open</div><div>Task Type:IMPACT Referral</div><div>Username:</div><div>Due Date (mm/dd/yyyy):</div><div>ICES Case Number:</div><div>Case Reference:</div><div>First:Ima</div><div>Middle/MI:</div></div><div><div>Search</div><div>Reset</div><div>Cancel</div></div><div><div>Search Results (Number of Items: 0)</div><div><div>Task ID</div><div>Task Type</div><div>Assigned To</div><div>Priority</div><div>Due Date</div></div></div></div></div></div></div></div></div></div>	Task ID	Task Type	Assigned To	Priority	Due Date	Status	12345	Process Application	Jo Daniels	Medium	03/04/2007	Open
Task ID	Task Type	Assigned To	Priority	Due Date	Status								
12345	Process Application	Jo Daniels	Medium	03/04/2007	Open								
7.	<p>To start another Task Search, click the <i>Reset</i> button, and the search criteria resets to blank options.</p> <div><div><div><div><div><div>Family and Social Services Administration</div><div>Home</div></div><div><div>navigation</div><div><div>Person</div><div>Case</div><div>Document</div><div>Tasks</div><div>User</div></div><div><div>recent items</div></div></div><div><div>Search Task</div><div><div>Search Criteria</div><div><div>Task Status:Open</div><div>Task Type:</div><div>Username:</div><div>Due Date (mm/dd/yyyy):</div><div>ICES Case Number:</div><div>Case Reference:</div><div>First:</div><div>Middle/MI:</div></div><div><div>Search</div><div>Reset</div><div>Cancel</div></div><div><div>Search Results</div><div><div>Task ID</div><div>Task Type</div><div>Assigned To</div><div>Priority</div><div>Due Date</div></div></div></div></div></div></div></div></div>												

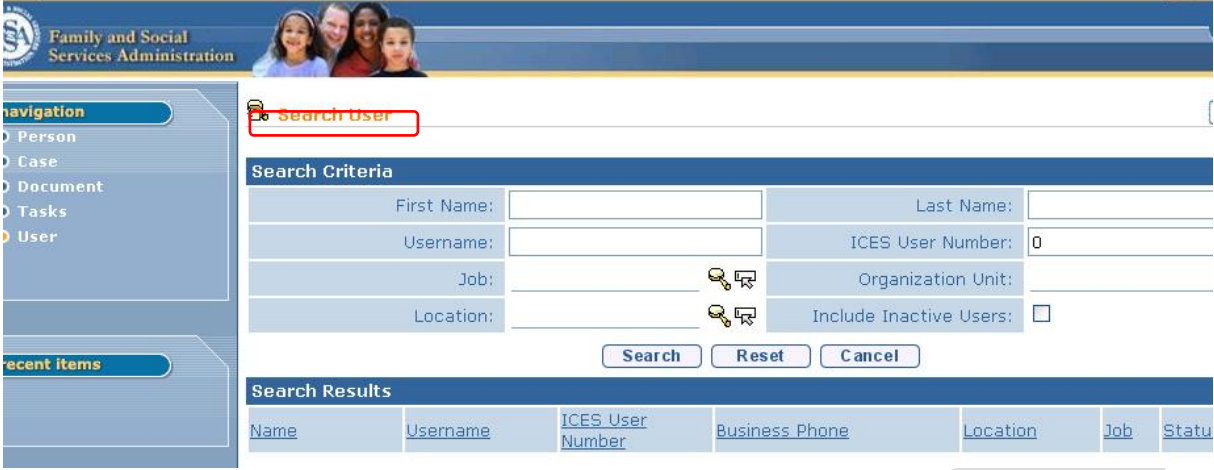

Steps	Searching for a Task
8.	<p>To end or cancel a Task Search, click the <i>Cancel</i> button and the User Home page displays.</p> <div><div><div>navigation</div><div><div>Person</div><div>Case</div><div>Document</div><div>Tasks</div><div>User</div></div><div>recent items</div></div><div><div>Search Task</div><div><div>Search Criteria</div><div><div>Task Status:OpenTask Type:</div><div>Username:Due Date (mm/dd/yyyy):</div><div>ICES Case Number:Case Reference:</div><div>First:Middle/MI:</div></div><div><div>Search</div><div>Reset</div><div>Cancel</div></div><div><div>Search Results</div><div><div>Task ID</div><div>Task Type</div><div>Assigned To</div><div>Priority</div><div>Due Date</div><div>Statu</div></div></div></div></div></div>


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3.11.4.9 Searching for an Internal User Work Instructions

The Internal User search may be used to locate contact information for a system user who has completed tasks on a specific case (WFMS or ICES).

Steps	Searching for an Internal User
1.	<p>Access the Search For option on the FSSA Case Management System Home page.</p>  <p>OR, you may search for a User by clicking the <i>Search</i> option on the left side Navigation bar.</p> 

Steps	Searching for an Internal User																		
2.	<p>Clicking either the <i>Search For</i> option and the <i>User</i> link, or the <i>Search</i> option on the left side Navigation bar displays the Search User page.</p> 																		
3.	<p>Enter available identifying information regarding the Internal User in the search fields.</p>  <p>The following table includes a description of each field on the User Search page.</p> <table> <tr> <th>Data Element</th><th>Description</th></tr> <tr> <td>First Name</td><td>User's First Name</td></tr> <tr> <td>Last Name</td><td>User's Last Name</td></tr> <tr> <td>User Name</td><td>Internal User</td></tr> <tr> <td>ICES User Number</td><td>Internal User's ICES User ID</td></tr> <tr> <td>Job</td><td>Position title of Internal User</td></tr> <tr> <td>Organization Unit</td><td>Unit assignment of Internal User</td></tr> <tr> <td>Location</td><td>Office assignment of Internal User</td></tr> <tr> <td>Include Active Users</td><td>Current system status of Internal User</td></tr> </table>	Data Element	Description	First Name	User's First Name	Last Name	User's Last Name	User Name	Internal User	ICES User Number	Internal User's ICES User ID	Job	Position title of Internal User	Organization Unit	Unit assignment of Internal User	Location	Office assignment of Internal User	Include Active Users	Current system status of Internal User
Data Element	Description																		
First Name	User's First Name																		
Last Name	User's Last Name																		
User Name	Internal User																		
ICES User Number	Internal User's ICES User ID																		
Job	Position title of Internal User																		
Organization Unit	Unit assignment of Internal User																		
Location	Office assignment of Internal User																		
Include Active Users	Current system status of Internal User																		

Steps	Searching for an Internal User
4.	<p>Conduct an internal user search using one or more of the following in the order of preference listed:</p> <ul style="list-style-type: none"> ✗ Last name of User ✗ First name of User ✓ Name of user ✓ ICES user ID ✓ Office location of user ✓ Organizational Unit the user is a member of ✓ User's job/position title ✓ Current status of the user <p>Click the <i>Search</i> button.</p> 

Steps**Searching for an Internal User**

5. A successful User Search displays the Name, Username, ICES User Number, Business Phone, Location, Job, and Status.

Search Results						
Name	Username	ICES User Number	Business Phone	Location	Job	Status

The screenshot shows the 'Search User' page of the Family and Social Services Administration. The left sidebar contains a 'navigation' menu with options: Person, Case, Document, Tasks, and User (selected). Below it is a 'recent items' section. The main content area has a 'Search User' header with a 'Help' button. Under 'Search Criteria', the following fields are filled: First Name: Linda, Last Name: Steinkuhl, Username: (empty), ICES User Number: 0, Job: (empty), Organization Unit: (empty), Location: (empty), and Include Inactive Users: ☐. Search, Reset, and Cancel buttons are present. The 'Search Results (Number of Items: 7)' table is displayed below.



Name	Username	ICES User Number	Business Phone	Location	Job	Status
Linda Steinkuhl	lscctier1	0		Grant - 27000	CC Tier 1 Intake Consultant 9	Active
Linda Steinkuhl	lswg8ea	0		Grant - 27000	WG 8 EA 16	Active
Linda Steinkuhl	lscctier2es	0		Grant - 27000	CC Tier 2 ES 10	Active

- Users do not have the ability to go to the User home page from the Results list.
- Users can only see a listing of users for the entered search criteria.

If no match is found, Search Results displays “Search Results: (Number of Items:0)” and Information displays “Record(s) cannot be found for the search criteria entered.”

The screenshot shows the 'Search User' page with the same navigation and sidebar as the previous image. In the 'Search Criteria' section, the fields are: First Name: Ima, Last Name: Client, Username: (empty), ICES User Number: 0, Job: (empty), Organization Unit: (empty), Location: (empty), and Include Inactive Users: ☐. A red box highlights the message: "Record(s) cannot be found for the search criteria entered." Below the search criteria, the 'Search Results (Number of Items: 0)' table is displayed, showing no results.

Name	Username	ICES User Number	Business Phone	Location	Job	Status
------	----------	------------------	----------------	----------	-----	--------

Steps	Searching for an Internal User
6.	<p>To start another User Search, click the <i>Reset</i> button and the search criteria resets the User Search to blank fields.</p>  <p>The screenshot shows the 'Search User' page. On the left is a navigation menu with options: Person, Case, Document, Tasks, and User (selected). Below it is a 'recent items' section. The main area is titled 'Search User' and contains a 'Search Criteria' section with fields for First Name, Last Name, Username, ICES User Number (set to 0), Job, Organization Unit, Location, and an 'Include Inactive Users' checkbox. At the bottom of the criteria section are three buttons: Search, Reset (circled in red), and Cancel. Below the criteria is a 'Search Results' section with a table header: Name, Username, ICES User Number, Business Phone, Location, and Job.</p>
7.	<p>To end or cancel a User Search, click the <i>Cancel</i> button and the User Home page displays.</p>  <p>This screenshot is identical to the one in step 6, showing the 'Search User' page. However, in this image, the 'Cancel' button at the bottom of the 'Search Criteria' section is circled in red instead of the 'Reset' button.</p>

3.11.4. Sending Notices

3.11.4.1 Overview

The Send Notice work instructions describe how Coalition and State employees in a Service Center or Help Center create and manage outbound correspondence. The Workflow Management System (WFMS) adds capabilities for automating correspondence not currently available in ICES, so outbound correspondence is generated from both the WFMS and ICES.

Notices automatically generated through actions taken in ICES continue in the modernized solution; WFMS does not duplicate such notices. Rather, the WFMS augments the notice module in ICES and allows the system or the user to automate correspondence that would otherwise be done on a manual (hard copy) form or notice.

After outbound correspondence has been created in the WFMS, the system records any due date(s) associated with the notice, generates the documents and bar-coded cover sheet in the recipient's preferred language, and then sends a request to the Outbound Mail Service Provider for mailing. All correspondence is mailed by default unless the correspondence is manually marked as "Printed." The WFMS creates a pending response task to track correspondence that requires a response. Images of all outbound correspondence are stored in the WFMS correspondence history for the associated recipient case record and are accessible for reference if the Client calls with questions or requests a copy be mailed again.

Correspondence Status in the WFMS (Insert hyperlink) 3.11.4.2	Create Correspondence in the WFMS (Insert hyperlink) 3.11.4.03	Add Addressee (Insert hyperlink) 3.11.4.04
Attach Document (Insert hyperlink) 3.11.4.05	Print Correspondence (Insert hyperlink) 3.11.4.06	View Correspondence History in the WFMS (Insert hyperlink) 3.11.4.07
Edit Correspondence in the WFMS (Insert hyperlink) 3.11.4.08	Delete correspondence in the WFMS (Insert hyperlink) 3.11.4.09	Re-mail Correspondence in the WFMS (Insert hyperlink) 3.11.4.10
Create Correspondence in the File Server (Insert hyperlink) 3.11.4.11	Creating an Attachment from the File Server (Insert hyperlink) 3.11.4.12	Re-mail Correspondence in ICES (Insert hyperlink) 3.11.4.13
Correspondence Screens in ICES (Insert hyperlink) 3.11.4.14	Re-mail Correspondence in ICES from CNVN (Insert hyperlink) 3.11.4.15	Re-mail Correspondence in ICES from CNHS (Insert hyperlink) 3.11.4.16

3.11.4.2 Correspondence Status in the WFMS

The WFMS maintains four statuses for correspondence. A correspondence status of “Scheduled” indicates the correspondence has been created and is scheduled for mailing. A correspondence status of “Mailed” indicates the correspondence has already been mailed to the designated addressee. A correspondence status of “Printed” indicates the correspondence has been printed locally at a Help Center and therefore not mailed to the designated addressee. A correspondence status of “Re-mailed” indicates a copy of previously mailed correspondence has been re-mailed to the designated addressee.

3.11.4.3 Create Correspondence in the WFMS

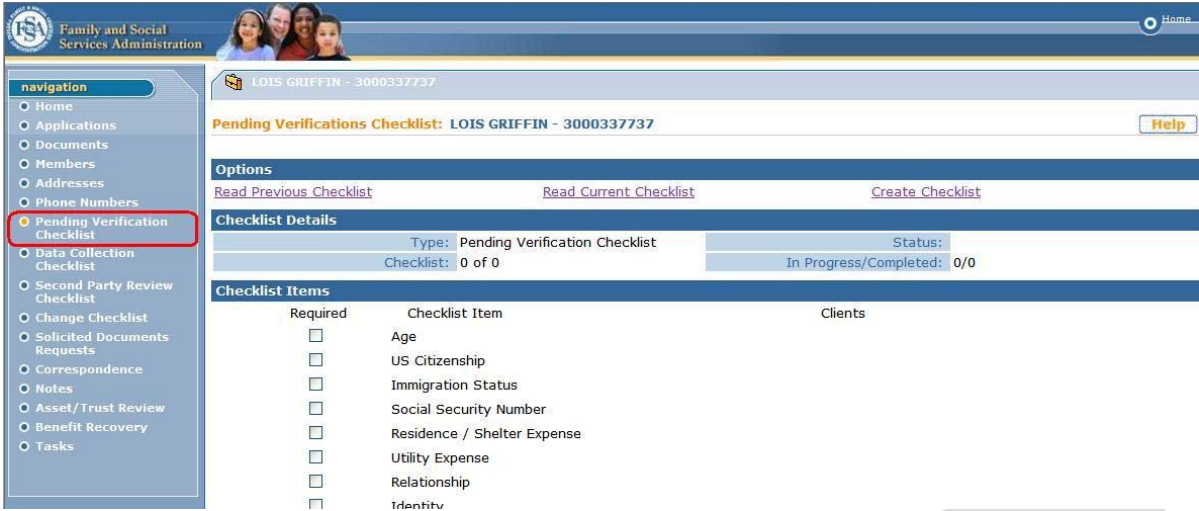
If more than one form/notice is included in the outbound correspondence, only the first form/notice selected is listed on the Correspondence page. Therefore, it is best practice to select the most relevant form/notice first. For example, if there is a need to create a FI 2032 Pending Verifications for Applicants-Recipients and include additional forms/notices, select the FI 2032 Pending Verifications for Applicants-Recipients first so the Correspondence page lists this as the detail line item.

Standard Practice: It is a standard practice for all Coalition staff to attempt collateral contacts when available and allowed by policy in an effort to avoid pending for the information.

Updating information during the Create Correspondence process in the WFMS does not update the case information in either the WFMS or ICES. Any information modified during the Create Correspondence process is only applied to the specific outbound correspondence. Therefore, correct the information either in ICES or the WFMS. All information should be updated in ICES if a case exists; if no ICES case exists, update the information in the WFMS. The first screen of Create Correspondence will allow the user to enter an additional address for third party correspondence or an alternative mailing address if the WFMS mailing address is not current.

FI 2032/FI 2032A: The FI 2032 Pending Verifications for Applicants-Recipients is pre-populated with information requested on the Pending Verification Checklist. Therefore, it is necessary to complete the Pending Verification Checklist in the WFMS before creating correspondence. The FI 2032A Pending Verifications for Applicants-Recipients for Application Case is NOT pre-populated with information requested on the Pending Verification Checklist. The FI 2032A Pending Verifications for Applicants-Recipients for Application Case should be used when only an application case exists or at the expedite appointment for an Add a Program/AG when the client name is not yet listed in the WFMS standard case. .

Step	Create Correspondence in the WFMS
1.	If the form to be sent is a FI 2032 Pending Verifications for Applicants-Recipients, follow Steps 2-6. If the form is not a 2032, go to Step 7.

Step	Create Correspondence in the WFMS
2.	<p data-bbox="264 243 1370 275">From the Case Home page, select Pending Verification Checklist from the left Navigation bar.</p>  <p data-bbox="264 791 990 823">The WFMS displays the Pending Verification Checklist page.</p>

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Step

3.

Create Correspondence in the WFMS

If the Pending Verification Checklist already contains marked boxes, it is necessary to remove any previously entered information. To remove the information, scroll to the bottom and click Edit.

The screenshot shows the 'Pending Verification Checklist' page. On the left is a sidebar with navigation links. The main content area has a header 'Options' with links 'Read Previous Checklist' and 'Read Current Checklist'. Below this is a 'Checklist Details' section showing 'Type: Pending Verification Checklist' and 'Status: In Progress'. The 'Checklist Items' table lists various items with checkboxes and a 'Clients' column. The 'Other Medical Expense' item is checked, and the 'Submit Online test two' button is highlighted. At the bottom, there is an 'Additional Information' section with 'Edit' and 'Close' buttons.

Required	Checklist Item	Clients
<input type="checkbox"/>	Age	
<input type="checkbox"/>	US Citizenship	
<input type="checkbox"/>	Immigration Status	
<input type="checkbox"/>	Social Security Number	
<input type="checkbox"/>	Residence / Shelter Expense	
<input type="checkbox"/>	Utility Expense	
<input type="checkbox"/>	Relationship	
<input type="checkbox"/>	Identity	
<input type="checkbox"/>	Bank Accounts / Financial Holdings	
<input type="checkbox"/>	Vehicles	
<input type="checkbox"/>	Real Property / Life Interest	
<input type="checkbox"/>	Life Insurance	
<input type="checkbox"/>	Release of Information	
<input type="checkbox"/>	Unearned Income	
<input type="checkbox"/>	Lump Sum Income	
<input type="checkbox"/>	Earned Income	
<input type="checkbox"/>	Dependent Care Expense	
<input type="checkbox"/>	Support Payments	
<input type="checkbox"/>	Third Party Medical Resources	
<input type="checkbox"/>	Documentation of Disability / Pregnancy / Medical Condition	
<input type="checkbox"/>	Immunization Records	
<input checked="" type="checkbox"/>	Other Medical Expense	Submit Online test two
<input type="checkbox"/>	Other :	
<input type="checkbox"/>	Other :	
<input type="checkbox"/>	Summary of Eligibility Redetermination Information	
<input type="checkbox"/>	Notice Regarding Rights and Responsibility	

The WFMS refreshes the Pending Verification Checklist page with the household members under the Clients column.

To uncheck a box, click on the checkmark. To remove the Client selection, hold down the Ctrl button and click the name to "un-select." Repeat until all previously entered information has been "un-selected."

This screenshot is a zoomed-in view of the 'Other Medical Expense' row in the checklist. It shows the checked checkbox, the text 'Other Medical Expense', and the 'Submit Online test two' button. Below this, there are two 'Other :' rows with input fields and 'Submit Online test two' buttons. At the bottom, there is an 'Additional Information' section with 'Save' and 'Cancel' buttons.

Step**Create Correspondence in the WFMS**

4.

Check the box next to each checklist item for which verification is required. Click the client/applicant name for which verification of an item is required. If more than one applicant/client needs to be selected, hold down the Ctrl button as you select each person. If a name was selected in error and needs to be removed, hold down the Ctrl button and click on the name to “un-select.”

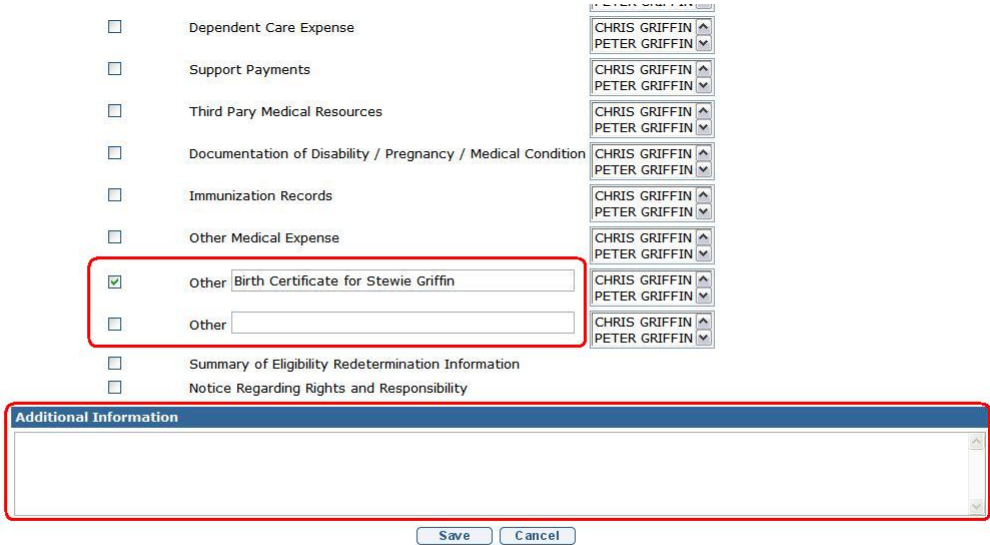
The screenshot displays the FSSA Pending Verifications Checklist for LOIS GRIFFIN - 3000337737. The interface includes a navigation sidebar on the left with 'navigation' and 'recent items' sections. The main content area shows the checklist details and a list of items to be verified.

Checklist Details


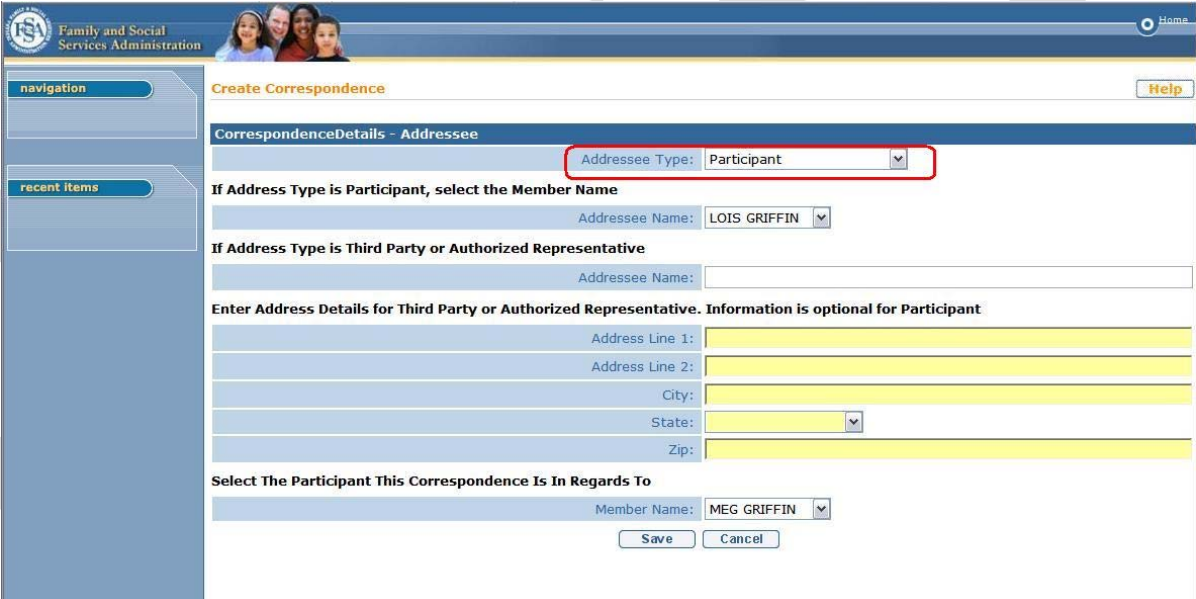
Type:	Status:
Pending Verification Checklist	
Checklist: 0 of 0	In Progress/Completed: 0/0

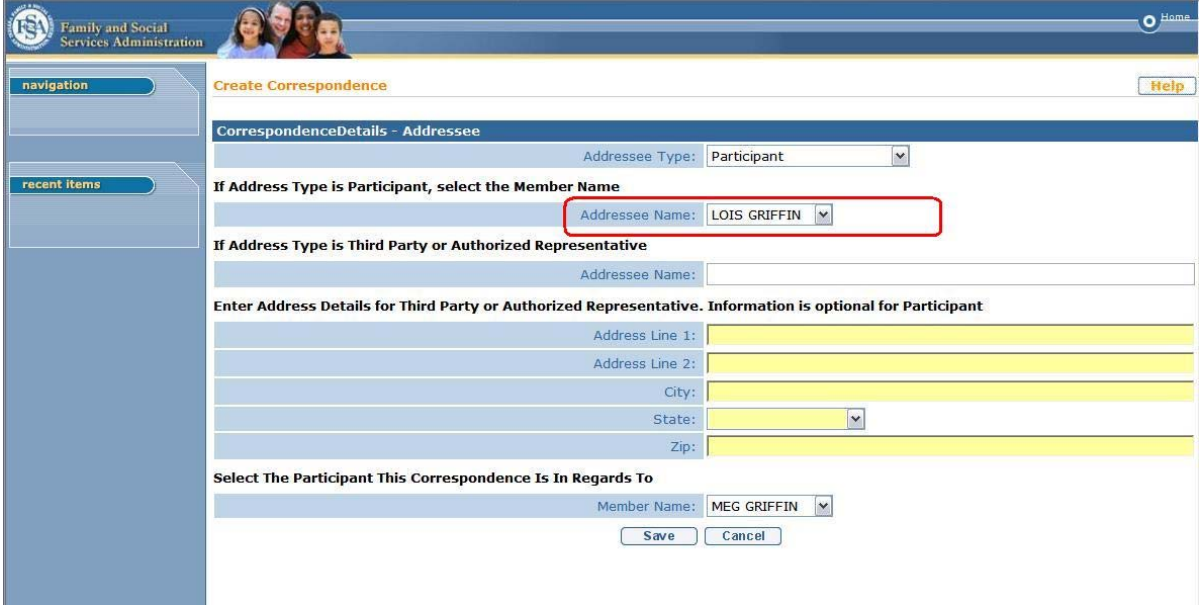
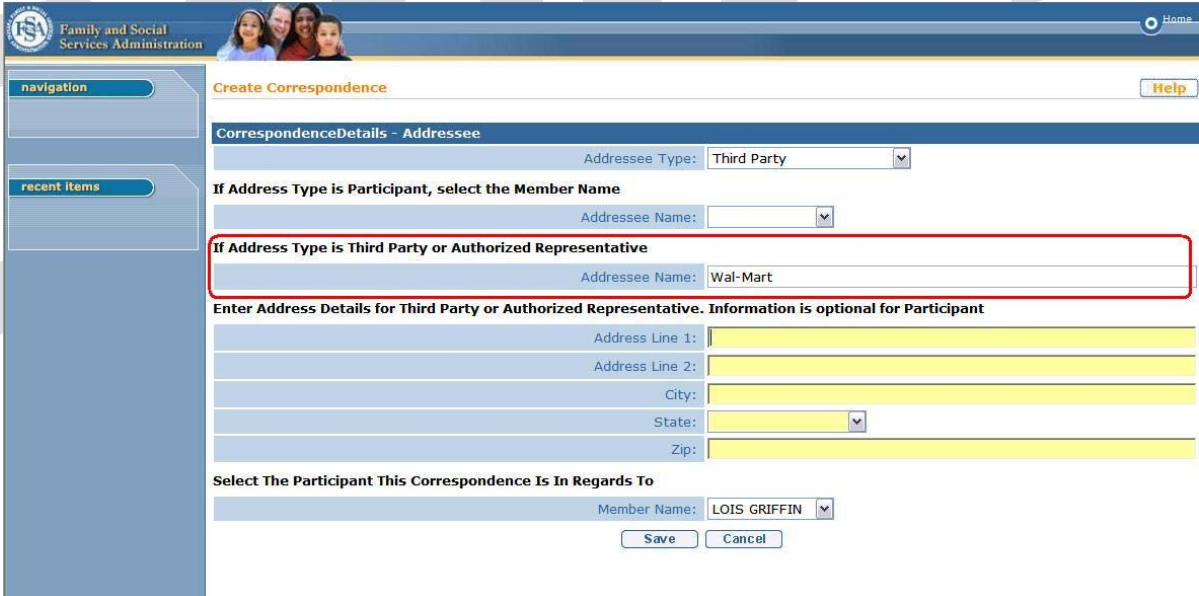
Checklist Items

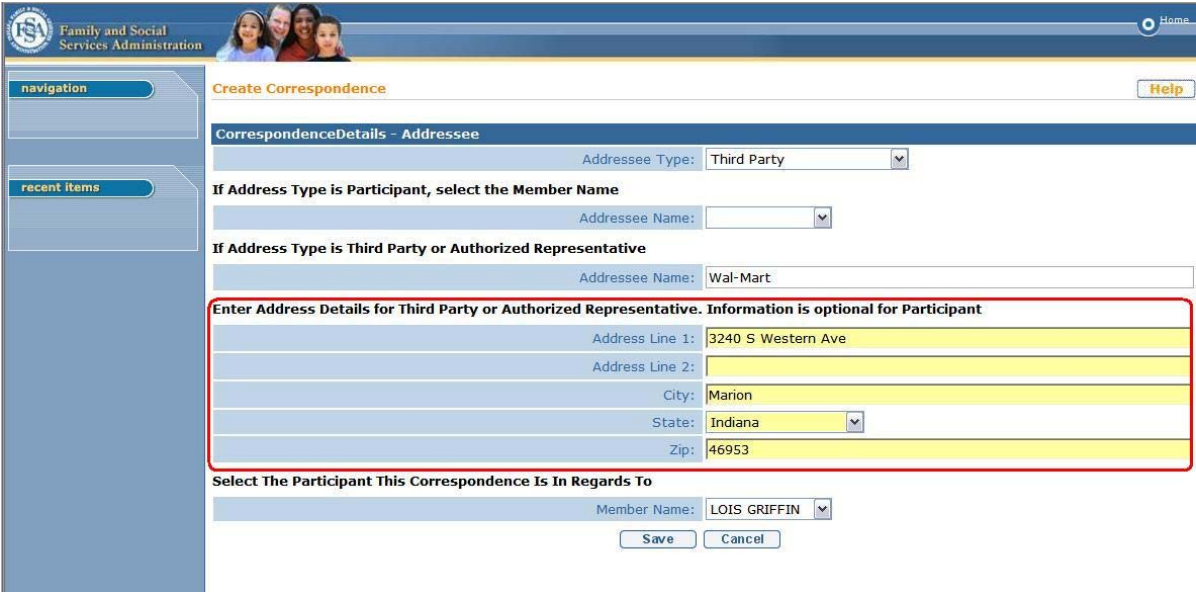
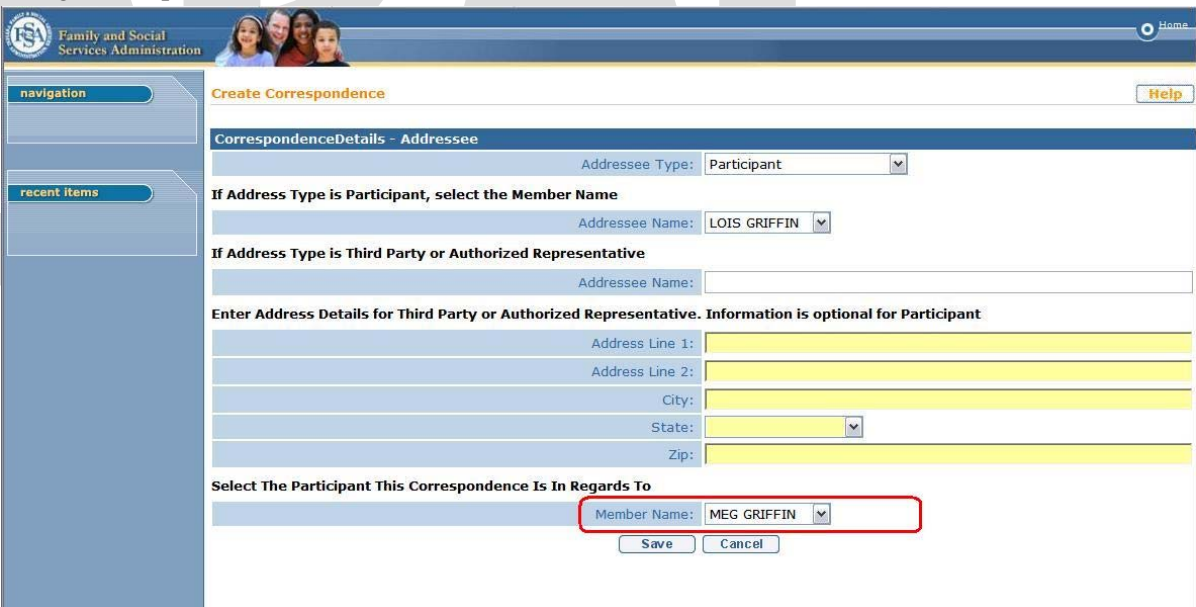
Required	Checklist Item	Clients
<input type="checkbox"/>	Age	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	US Citizenship	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Immigration Status	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Social Security Number	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input checked="" type="checkbox"/>	Residence / Shelter Expense	MEG GRIFFIN ^ LOIS GRIFFIN v
<input type="checkbox"/>	Utility Expense	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Relationship	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Identity	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input checked="" type="checkbox"/>	Bank Accounts / Financial Holdings	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Vehicles	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Real Property / Life Interest	CHRIS GRIFFIN ^ PETER GRIFFIN v
<input type="checkbox"/>	Life Insurance	CHRIS GRIFFIN ^ PETER GRIFFIN v

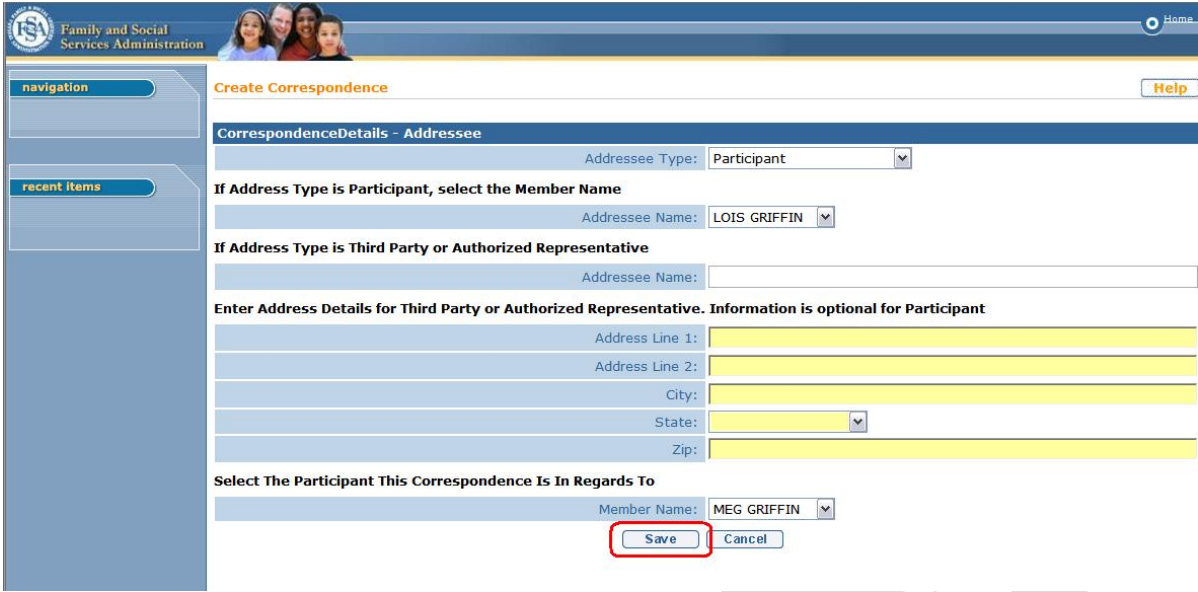

Step	Create Correspondence in the WFMS
5.	<p data-bbox="264 243 1456 338">Enter any additional information in the Other box(es) or Additional Information box if necessary. If a household member has been added to the ICES case, but has not yet been updated in the WFMS case, use the Other box(es) to request verification for this individual.</p> <div data-bbox="459 415 1443 957">  <p>The screenshot shows a web form titled 'Create Correspondence in the WFMS'. It contains a list of categories for requesting verification, each with a checkbox and a dropdown menu. The categories are: Dependent Care Expense, Support Payments, Third Party Medical Resources, Documentation of Disability / Pregnancy / Medical Condition, Immunization Records, Other Medical Expense, Other, Summary of Eligibility Redetermination Information, and Notice Regarding Rights and Responsibility. The 'Other' category is selected with a checkbox, and the dropdown menu shows 'Birth Certificate for Stewie Griffin'. Below the list is a large 'Additional Information' text area, which is also highlighted with a red box. At the bottom are 'Save' and 'Cancel' buttons.</p> </div> <p data-bbox="349 1016 1456 1318">Note: since applicants for Medicaid may be eligible to receive benefits three months prior to the month of application if they meet eligibility requirements, be sure to request specific information needed for this time period. For example, when income is requested for the retroactive month to determine eligibility, specify exactly what is needed on the 2032, not a general statement to “return income.” All income and resources available to applicants must be verified for each month and entered on appropriate ICES screens when received. If the 2032 includes only a general request, this information will have to be requested again when the next user tries to complete the tasks when the client sends in something, but not what was specifically needed.</p> <p data-bbox="349 1339 1456 1467">For Hoosier Healthwise cases, simplified verifications are used in determining eligibility for retroactive Medicaid coverage. If the applicant/recipient states that current income is a reflection of income in the past three months, no further verification is needed.</p>

Step	Create Correspondence in the WFMS
6.	<p>When the selection of verifications and names is complete, click <i>Save</i>.</p> <div data-bbox="467 294 1442 835"> <div> <input type="checkbox"/> Dependent Care Expense <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Support Payments <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Third Pary Medical Resources <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Documentation of Disability / Pregnancy / Medical Condition <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Immunization Records <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Other Medical Expense <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Other <input type="text"/> <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Other <input type="text"/> <div> CHRIS GRIFFIN ▲ PETER GRIFFIN ▼ </div> </div> <div> <input type="checkbox"/> Summary of Eligibility Redetermination Information <div></div> </div> <div> <input type="checkbox"/> Notice Regarding Rights and Responsibility <div></div> </div> <div>Additional Information</div> <div> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> </div> <p>The WFMS refreshes the Pending Verification Checklist page with the requested information. Note: when sending a FI 2032, you will have to select this form from the list. This form will already be populated with the information entered from the Pending Verification Checklist.</p>
7.	<p>From the Application or Case Home page, click <i>Correspondence</i> from the left Navigation bar.</p> <div data-bbox="261 1031 1458 1528"> </div> <p>The WFMS displays the Correspondence page.</p>

Step	Create Correspondence in the WFMS
8.	<p>Click <i>Create</i>.</p>  <p>The WFMS displays the Create Correspondence page.</p>
9.	<p>Using the drop down box, select the Addressee Type (Participant, Authorized Representative, or Third Party).</p> 

Step	Create Correspondence in the WFMS
10.	<p>Using the drop down box, select the Addressee Name. Since the address in WFMS is a physical address, review ICES to determine if a current mailing address is available for use in sending correspondence.</p> <p>Note: This field is only required if Participant is selected as Addressee Type.</p> 
11.	<p>If Third Party or Authorized Representative is selected as the Addressee Type, enter the Addressee Name (e.g. McDonalds, Wal-Mart, Fifth Third Bank, etc).</p> 

Step	Create Correspondence in the WFMS
12.	<p>Enter Address Details for the Third Party or Authorized Representative. If an address has been changed in ICES but has not yet been updated in the WFMS case, enter the applicant/Client's new address here or if the WFMS mailing address does not agree with the current mailing address in ICES, use this screen to enter current mailing address</p> <p>Note: Updating addresses on this screen does not update the address information in the WFMS or ICES. If an ICES case exists, update the appropriate ICES screen with the correct information. If an ICES case does not yet exist, update the appropriate WFMS screen.</p>  <p>The screenshot shows the 'Create Correspondence' interface. The 'Addressee Type' is 'Third Party'. The 'Addressee Name' is 'Wal-Mart'. The address details are: Address Line 1: 3240 S Western Ave, Address Line 2: (empty), City: Marion, State: Indiana, Zip: 46953. The participant 'LOIS GRIFFIN' is selected in the 'Select The Participant This Correspondence Is In Regards To' section. The address details section is highlighted with a red box.</p>
13.	<p>Using the drop down box, select the Member Name.</p>  <p>The screenshot shows the 'Create Correspondence' interface. The 'Addressee Type' is 'Participant'. The 'Addressee Name' is 'LOIS GRIFFIN'. The address details are empty. The participant 'MEG GRIFFIN' is selected in the 'Select The Participant This Correspondence Is In Regards To' section. The participant selection section is highlighted with a red box.</p>

Step	Create Correspondence in the WFMS
14.	<p>Once all Addressee Details have been entered, click Save.</p>  <p>The WFMS displays the Select Correspondence Type page.</p>
15.	<p>Under the Program Selection cluster, select the appropriate assistance group for which the correspondence is to be sent.</p> 

Step**Create Correspondence in the WFMS**

16.

Click *Search*.

The forms/notices associated with the chosen assistance group populate under the Select the Correspondence Type cluster.

Family and Social Services Administration

Home

navigation

recent items

Select Correspondence Type

Help

Program Selection

Assistance Group: **Food Stamps**

Search Cancel

Select the correspondence type (Number of Items: 29)

Action	Document ID	Name
Select View	Auth Rep	Authorized Representative Form
Select View	Aux Ben	Auxiliary Benefits Notice
Select View	Blank	Blank Template
Select View	Cert Assign	Client Certification & Assignment
Select View	DFR CCDF	DFR CCDF Referral
Select View	FI 0007	Notice Of Interview-Appointment
Select View	FI 0009	Notice Regarding Rights and Responsibilities
Select View	FI 0014	Authorization for Release of Financial Information
Select View	FI 0022	Shelter Collateral Request
Select View	FI 0042	Notice of Missed Interview
Select View	FI 0065	Request for Earnings Information
Select View	FI 2030	Application For Hoosier Healthwise
Select View	FI 2030S	Hoosier Healthwise Para Ninos Y Mujeres
Select View	FI 2032	Pending Verifications for Applicants-Recipients
Select View	FI 2032 (A)	Pending Verifications for Applicants-Recipients for Application Case
Select View	FI 2246	Notice of Disqualification
Select View	FI 2326	Notification of Requirement to Provide Documentation of Citizenship
Select View	FI 2420	Report of Change
Select View	FI 2421	Change Reporting Requirements
Select View	FI 2510	Consent for Release of Social Security Number
Select View	FI 2511	Consent for Release of Information
Select View	FI FS 0041	Notice of Action
Select View	Gen Cov	General Use Document Cover Sheet
Select View	IMP 0007	Self-Sufficiency Plan For Impact Client
Select View	IMP 0031	Follow-Up Appointment for Impact
Select View	IMP 2210	Notice of Noncompliance with Impact Requirements
Select View	IMP 2641A	Claim - Voucher For Food Stamp Child Care
Select View	IMP 2641B	Claim Voucher - For Food Stamps
Select View	IMP 2641C	Claim Voucher

Step**Create Correspondence in the WFMS**

17. Identify the form/notice to be sent. If necessary, click either *Document ID* or *Name* to sort the results list.

Family and Social Services Administration

navigation

recent items

Select Correspondence Type

Program Selection

Assistance Group: Food Stamps

Search Cancel

Select the correspondence type (Number of Items: 29)

Action	Document ID	Name
Select View	Auth Rep	Authorized Representative Form
Select View	Aux Ben	Auxiliary Benefits Notice
Select View	Blank	Blank Template
Select View	Cert Assign	Client Certification & Assignment
Select View	DFR CCDF	DFR CCDF Referral
Select View	FI 0007	Notice Of Interview-Appointment
Select View	FI 0009	Notice Regarding Rights and Responsibilities
Select View	FI 0014	Authorization for Release of Financial Information
Select View	FI 0022	Shelter Collateral Request
Select View	FI 0042	Notice of Missed Interview
Select View	FI 0065	Request for Earnings Information
Select View	FI 2030	Application For Hoosier Healthwise
Select View	FI 2030S	Hoosier Healthwise Para Ninos Y Mujeres
Select View	FI 2032	Pending Verifications for Applicants-Recipients
Select View	FI 2032 (A)	Pending Verifications for Applicants-Recipients for Application Case
Select View	FI 2246	Notice of Disqualification

Note: To view a display only copy of the form/notice, click *View* under the Action column. A display only copy of the form/notice opens in a separate window.

Family and Social Services Administration

navigation

recent items

Select Correspondence Type



Program Selection


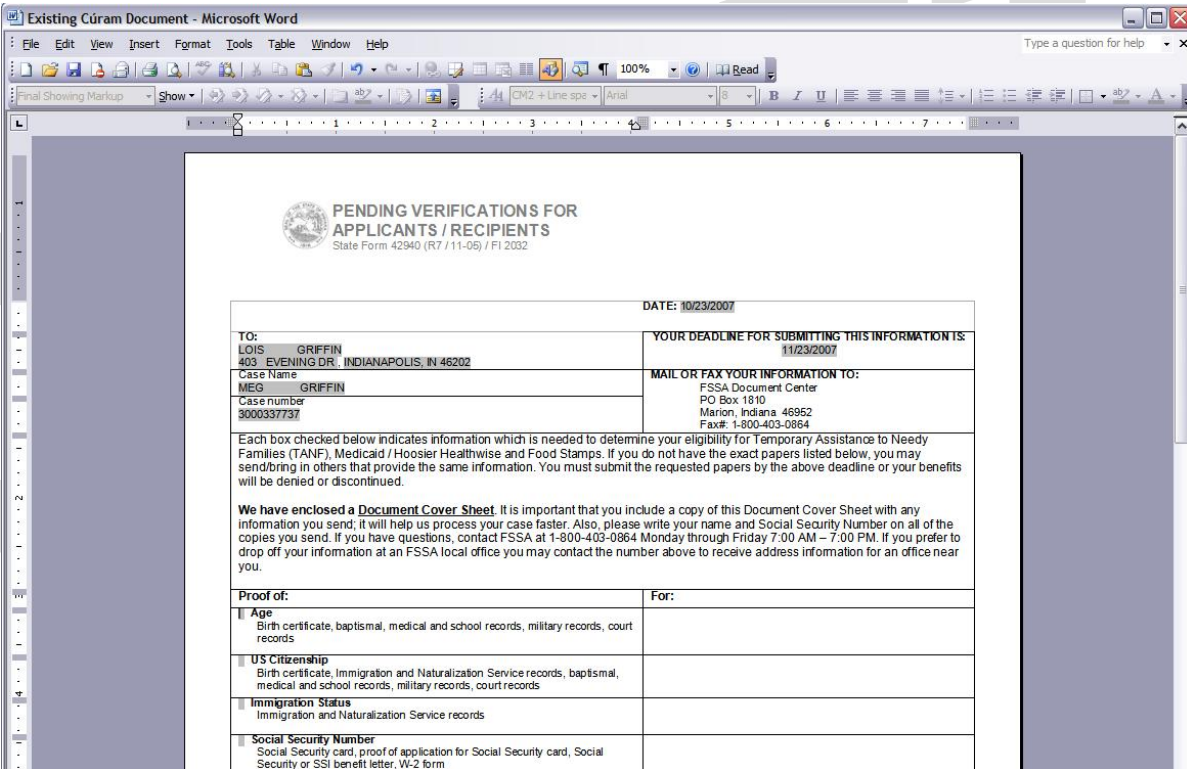
Assistance Group: Food Stamps

Search Cancel

Select the correspondence type (Number of Items: 29)

Action	Document ID	Name
Select View	Auth Rep	Authorized Representative Form
Select View	Aux Ben	Auxiliary Benefits Notice
Select View	Blank	Blank Template
Select View	Cert Assign	Client Certification & Assignment
Select View	DFR CCDF	DFR CCDF Referral
Select View	FI 0007	Notice Of Interview-Appointment
Select View	FI 0009	Notice Regarding Rights and Responsibilities
Select View	FI 0014	Authorization for Release of Financial Information
Select View	FI 0022	Shelter Collateral Request
Select View	FI 0042	Notice of Missed Interview
Select View	FI 0065	Request for Earnings Information
Select View	FI 2030	Application For Hoosier Healthwise
Select View	FI 2030S	Hoosier Healthwise Para Ninos Y Mujeres
Select View	FI 2032	Pending Verifications for Applicants-Recipients
Select View	FI 2032 (A)	Pending Verifications for Applicants-Recipients for Application Case
Select View	FI 2246	Notice of Disqualification

Step	Create Correspondence in the WFMS
18.	<p>Click <i>Select</i> to designate the form/notice to be sent.</p>  <p>If the form/notice to be sent is not listed, refer to Section 3.11.4.11, Create Correspondence from the File Server.</p> <p>The WFMS displays the Create Correspondence Details page.</p>
19.	<p>Review correspondence details for accuracy.</p> <ul style="list-style-type: none"> Verify the Mail Date field is correctly populated. To modify the Mail Date, either enter the date (mm/dd/yyyy) or click the Calendar icon. Select the appropriate Mail Date. The WFMS updates the Mail Date. Verify the Due Date field is correctly populated. To modify the Due Date, either enter the date (mm/dd/yyyy) or click the Calendar icon. Select the appropriate Due Date. The WFMS updates the Due Date. 

Step	Create Correspondence in the WFMS
20.	<p>Once the Mail Date and/or Due Date have been modified (if applicable), click Save.</p>  <p>The WFMS displays the Edit Document page and opens an image of the form/notice in a separate window.</p>
21.	<p>Review the image of the form/notice to verify all data fields have been correctly populated.</p> 
22.	<p>Enter any additional comments in the appropriate fields on the form/notice.</p> <p>Note: The FI 2032 Pending Verifications for Applicants-Recipients is pre-populated based on information requested on the Pending Verification Checklist. Therefore, it is necessary to first update the Pending Verification Checklist before creating a FI 2032.</p>

Step**Create Correspondence in the WFMS**

23. Once all information has been reviewed and any additional comments have been entered, click the X in the upper right corner.

Existing Cúram Document - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

Final Showing Markup Show CM2 + Line sp Arial 100% Read

PENDING VERIFICATIONS FOR APPLICANTS / RECIPIENTS
State Form 42940 (R7 / 11-05) / FI 2032

DATE: 10/23/2007

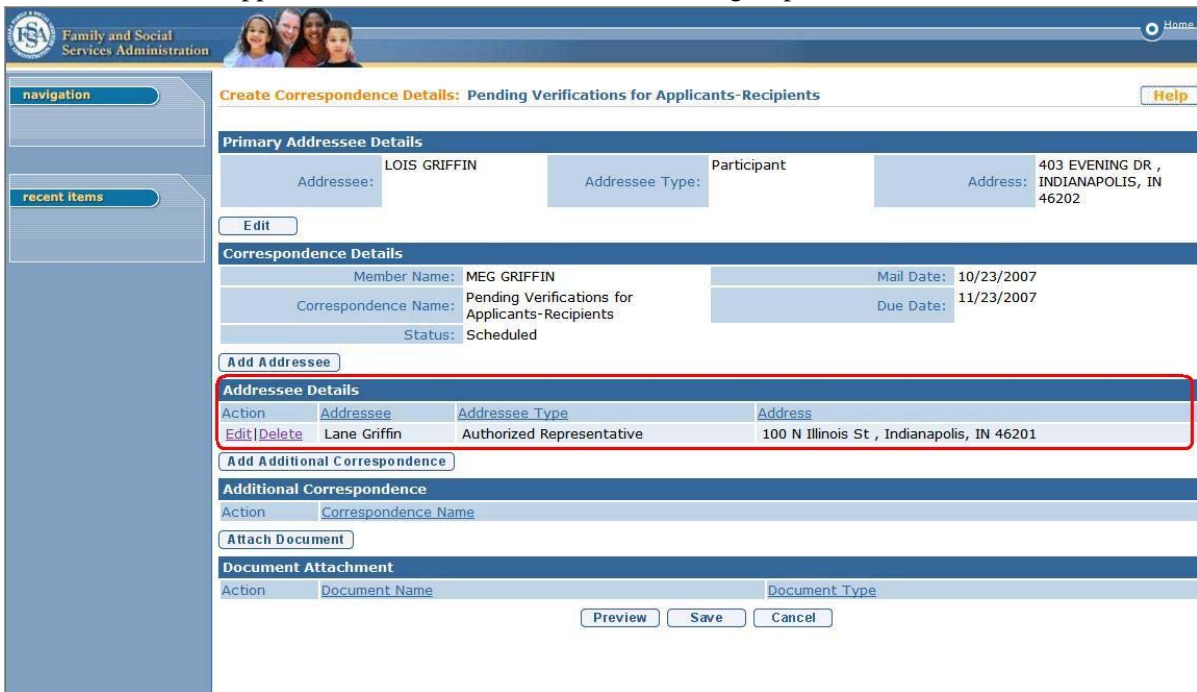
TO: LOIS GRIFFIN 403 EVENING DR, INDIANAPOLIS, IN 46202	YOUR DEADLINE FOR SUBMITTING THIS INFORMATION IS: 11/23/2007
CASE Name MEG GRIFFIN Case number 3000337737	MAIL OR FAX YOUR INFORMATION TO: FSSA Document Center PO Box 1810 Marion, Indiana 46962 Fax#: 1-800-403-0864

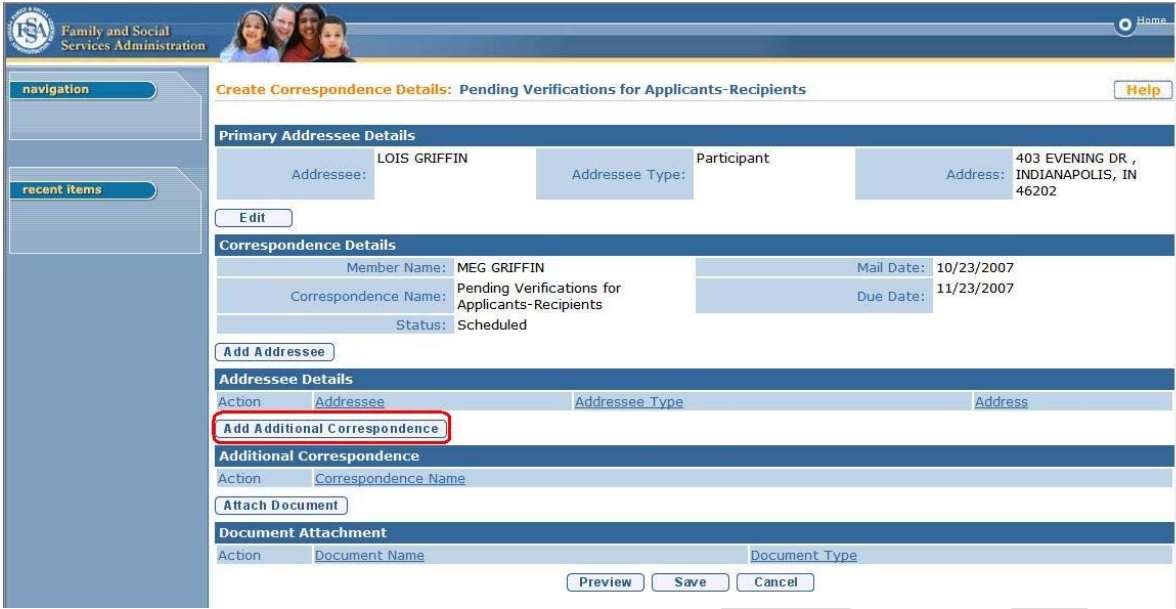
Each box checked below indicates information which is needed to determine your eligibility for Temporary Assistance to Needy Families (TANF), Medicaid / Hoosier Healthwise and Food Stamps. If you do not have the exact papers listed below, you may send/bring in others that provide the same information. You must submit the requested papers by the above deadline or your benefits will be denied or discontinued.

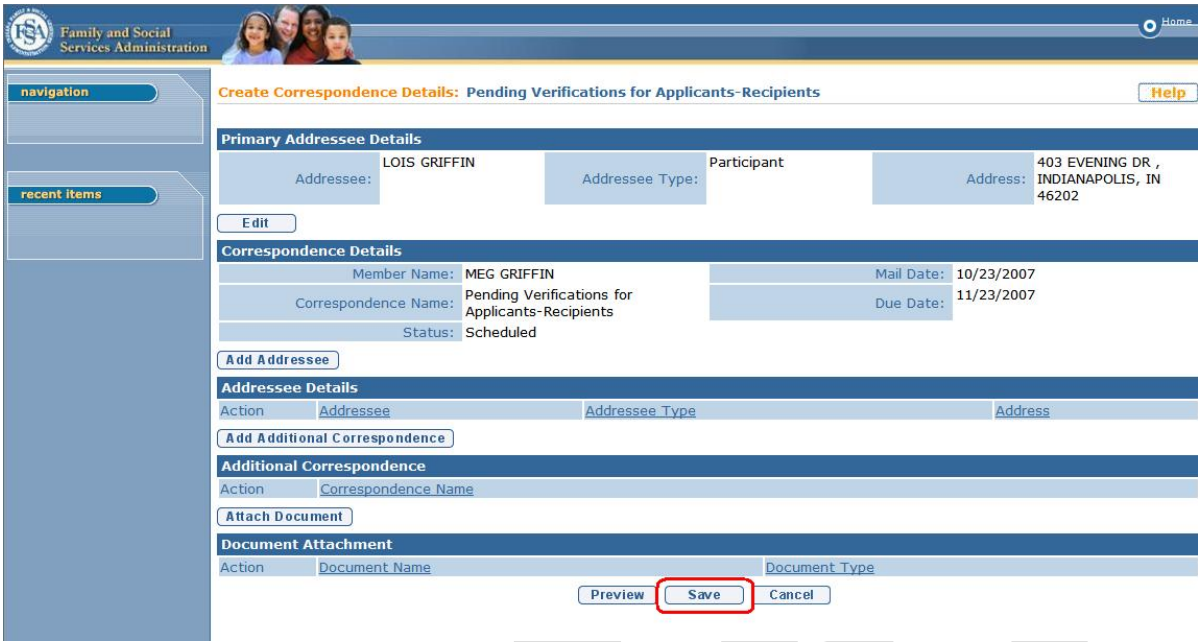
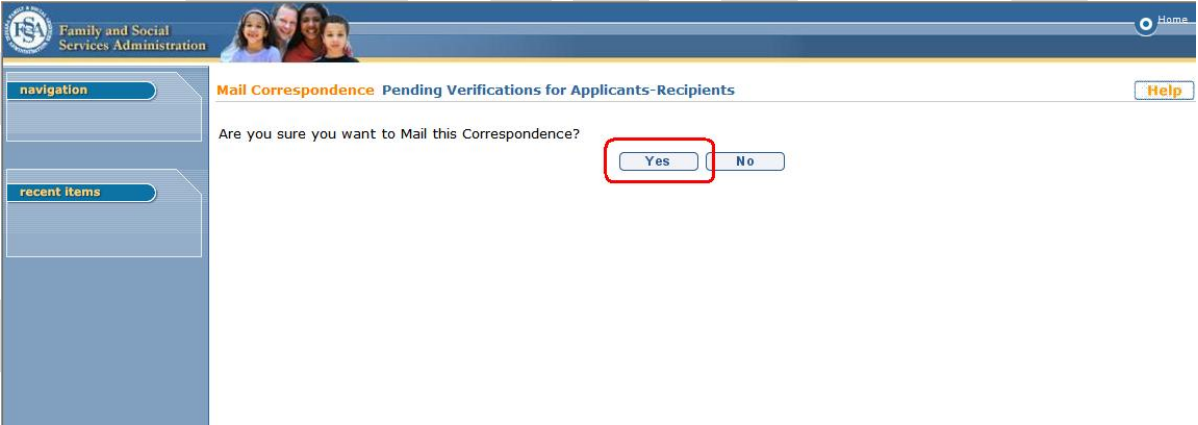
We have enclosed a Document Cover Sheet. It is important that you include a copy of this Document Cover Sheet with any information you send; it will help us process your case faster. Also, please write your name and Social Security Number on all of the copies you send. If you have questions, contact FSSA at 1-800-403-0864 Monday through Friday 7:00 AM – 7:00 PM. If you prefer to drop off your information at an FSSA local office you may contact the number above to receive address information for an office near you.

Proof of:	For:
<input type="checkbox"/> Age Birth certificate, baptismal, medical and school records, military records, court records	
<input type="checkbox"/> US Citizenship Birth certificate, Immigration and Naturalization Service records, baptismal, medical and school records, military records, court records	
<input type="checkbox"/> Immigration Status Immigration and Naturalization Service records	
<input type="checkbox"/> Social Security Number Social Security card, proof of application for Social Security card, Social Security or SSI benefit letter, W-2 form	

The WFMS saves the form/notice back to the server and displays the Create Correspondence Details page.

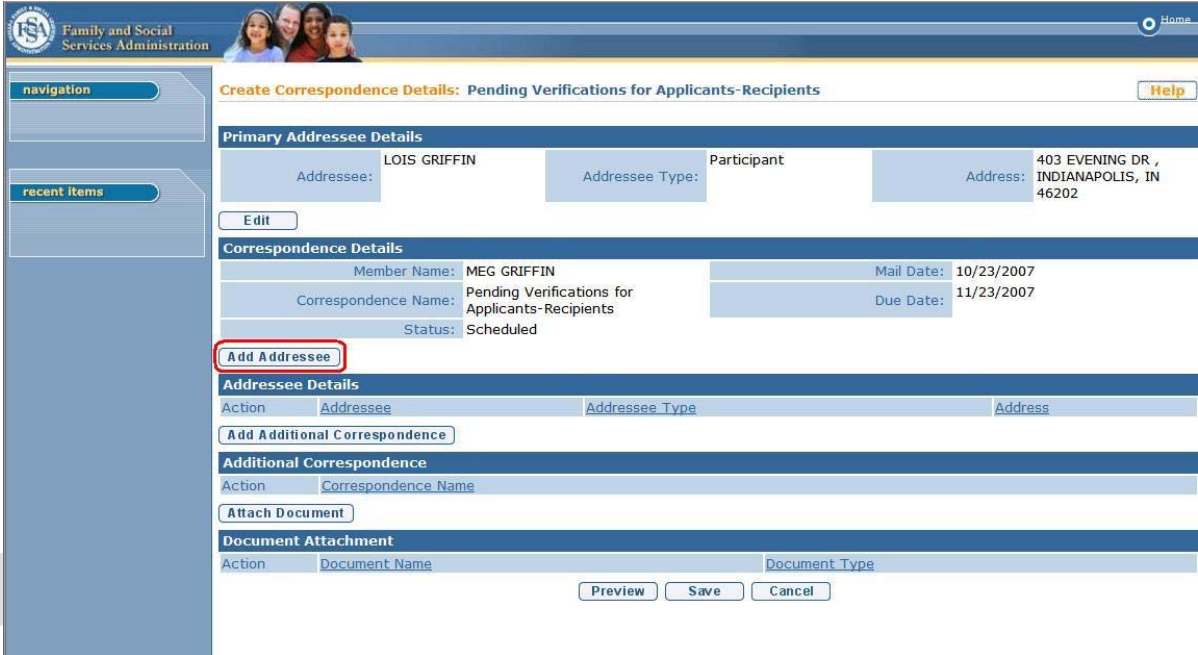
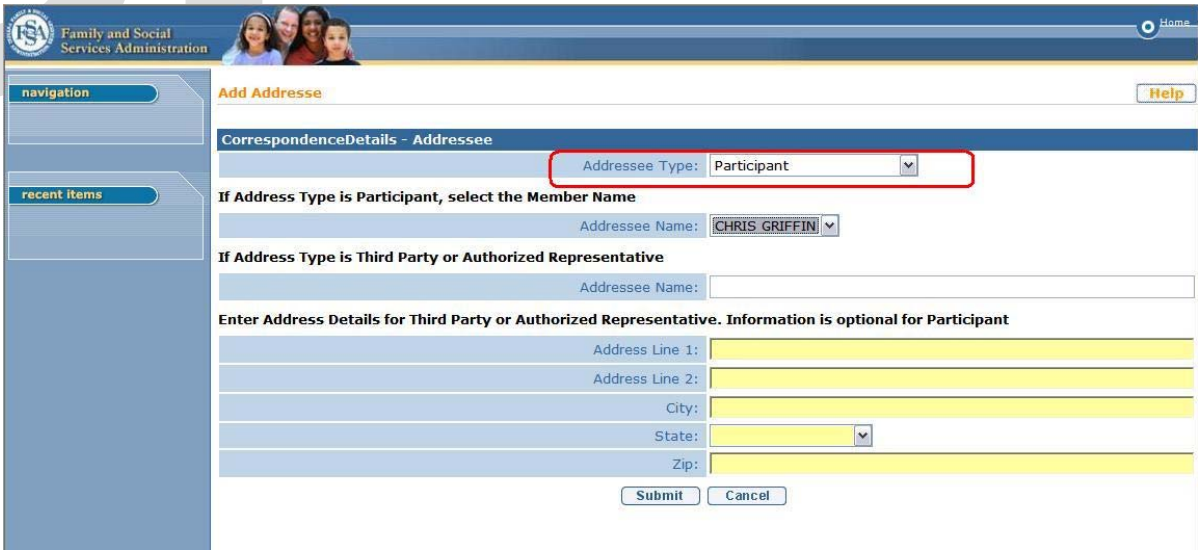
Step	Create Correspondence in the WFMS															
24.	<p>Review all Addressee Details for accuracy. Verify that all Authorized Representatives designated to receive notices for applicant/Client and the chosen assistance group are listed.</p> <div></div> <ul style="list-style-type: none">To add an addressee, refer to Section 3.11.4.4, Add Addressee.To modify Addressee Details, click <i>Edit</i>. The WFMS displays the Edit Correspondence Details page. Once information has been modified, click <i>Save</i>. The WFMS displays the Create Correspondence Details page. <p>Note: Updating addressee details on this screen does not update the information in the WFMS or ICES. If an ICES case exists, update the appropriate ICES screen with the correct information. If an ICES case does not yet exist, update the appropriate WFMS screen if WFMS mailing address does not agree with the current mailing address in ICES, use this screen to enter current mailing address .</p> <ul style="list-style-type: none">To delete an addressee, click Delete next to the addressee to be deleted. The WFMS displays the Delete Correspondence Addressee page. Click Yes. The WFMS displays the Create Correspondence Details page.															
25.	<p>Determine if any additional forms/notices should be included in the correspondence packet. If no additional forms/notice should be included, skip to step 28.</p> <p>Note: In order for the WFMS to create tasks for any pending response(s) based on due date(s) for Medicaid Disability notices, a separate correspondence packet must be created for the following notices:</p> <table><tr><td>Select/View</td><td>FI 2320</td><td>Medicaid Disability Initial Action Notice to Applicant</td></tr><tr><td>Select/View</td><td>FI 2321</td><td>Medicaid Disability Follow-Up Action Notice to Applicant</td></tr><tr><td>Select/View</td><td>FI 2322</td><td>Medicaid Disability Initial Request to Provider for Records</td></tr><tr><td>Select/View</td><td>FI 2323</td><td>Medicaid Disability Follow-Up Request to Provider for Records</td></tr><tr><td>Select/View</td><td>FI 2324</td><td>Medicaid Disability Request to Applicant to Obtain Records</td></tr></table>	Select/View	FI 2320	Medicaid Disability Initial Action Notice to Applicant	Select/View	FI 2321	Medicaid Disability Follow-Up Action Notice to Applicant	Select/View	FI 2322	Medicaid Disability Initial Request to Provider for Records	Select/View	FI 2323	Medicaid Disability Follow-Up Request to Provider for Records	Select/View	FI 2324	Medicaid Disability Request to Applicant to Obtain Records
Select/View	FI 2320	Medicaid Disability Initial Action Notice to Applicant														
Select/View	FI 2321	Medicaid Disability Follow-Up Action Notice to Applicant														
Select/View	FI 2322	Medicaid Disability Initial Request to Provider for Records														
Select/View	FI 2323	Medicaid Disability Follow-Up Request to Provider for Records														
Select/View	FI 2324	Medicaid Disability Request to Applicant to Obtain Records														

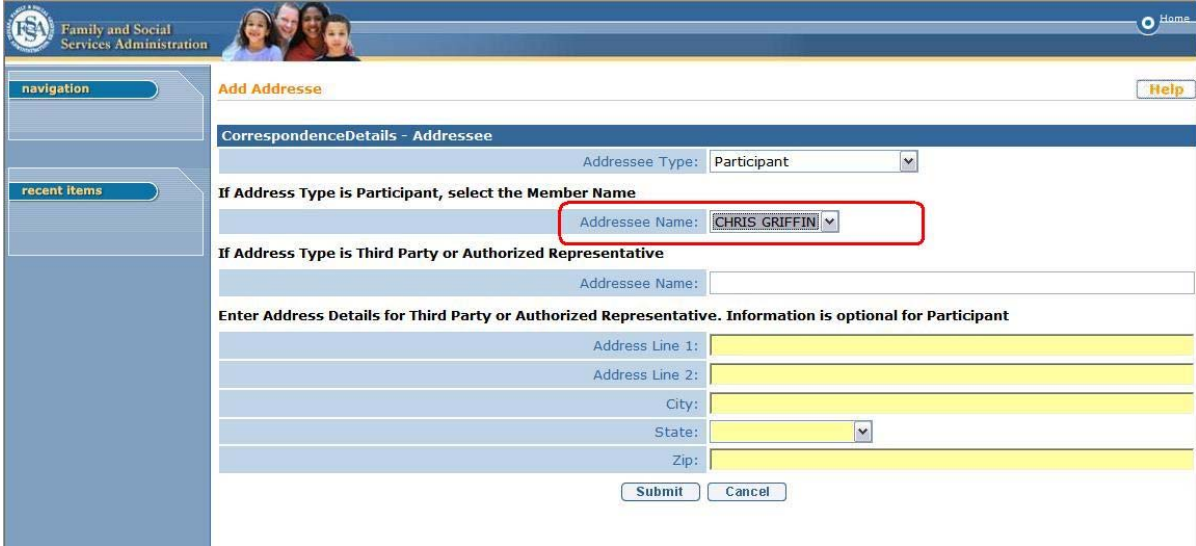
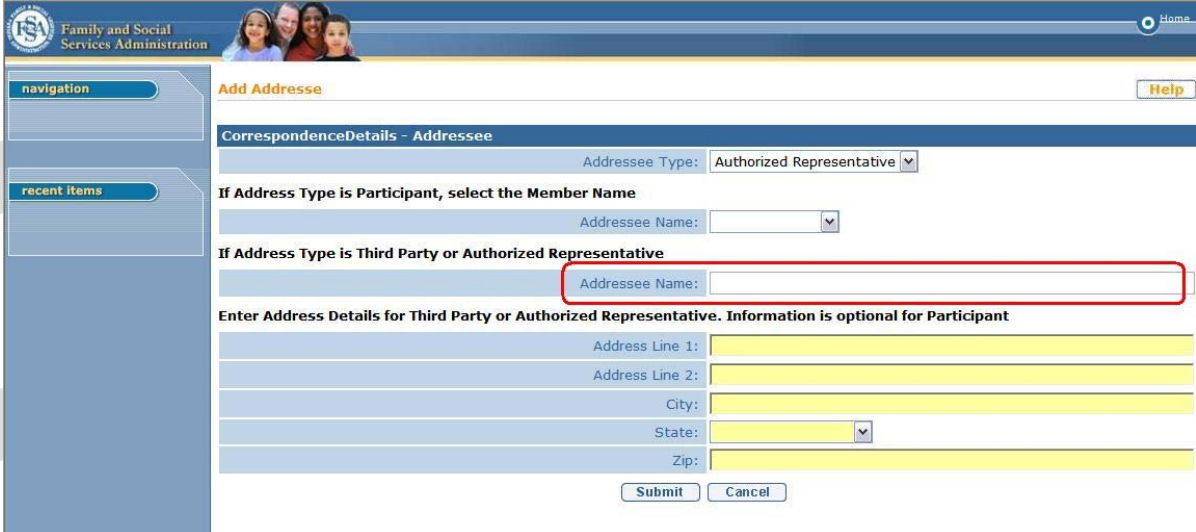
Step	Create Correspondence in the WFMS
26.	<p>Click Add Additional Correspondence.</p>  <p>The WFMS displays the Select Correspondence Type page.</p>
27.	Repeat steps 15-26 as necessary.
28.	<p>Determine if any documents indexed to the application, case, or Client should be included in the correspondence packet. If any documents should be included, refer to Section 0, 3.11.4.5 Attach Document. If no documents should be included, continue with step 29.</p> <p>Note: Certain forms/notices require a release of information form to be sent in the outbound correspondence packet. Be sure to attach any necessary release of information forms in accordance with policy.</p>

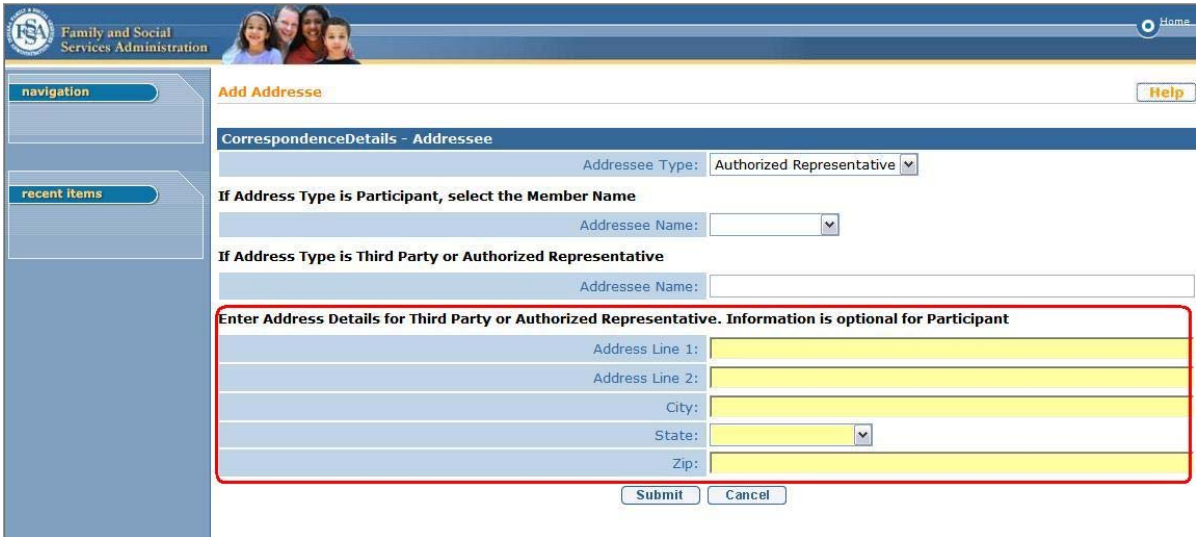
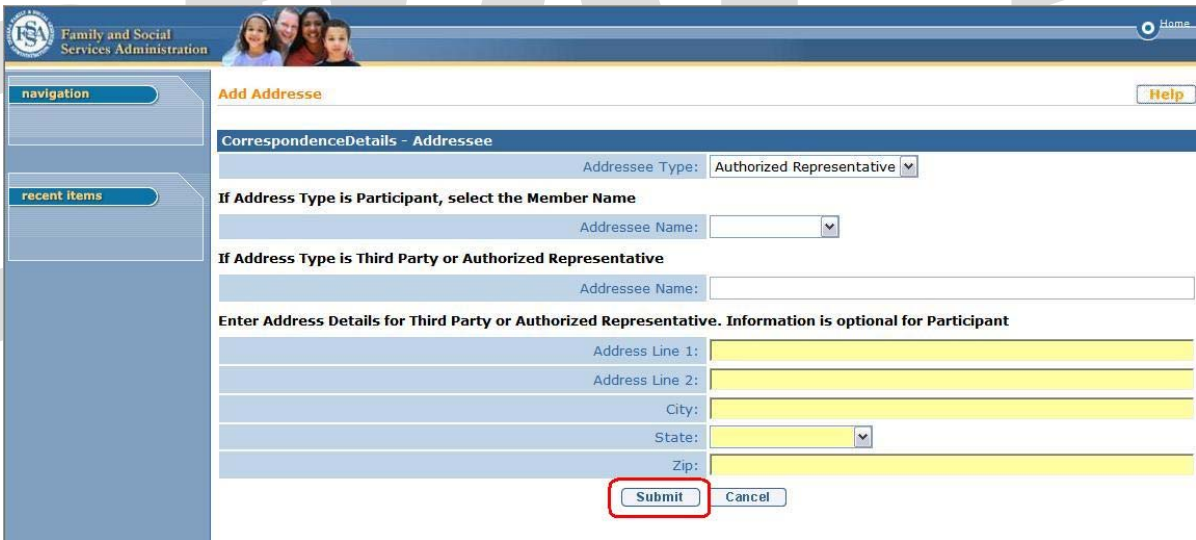
Step	Create Correspondence in the WFMS
29.	<p>Once all correspondence details have been entered and the entire correspondence packet has been created, click Save.</p>  <p>The WFMS displays the Mail Correspondence confirmation page.</p>
30.	<p>Click Yes.</p>  <ul style="list-style-type: none"> ✓ The WFMS mails the outbound correspondence packet, creates tasks for any pending response(s) based on due date(s) and displays the Correspondence page with the newly created correspondence packet listed under the Mailing Correspondence List cluster. ✓ To print the correspondence packet locally, refer to Section 3.11.4.6, Print Correspondence.
31.	<p>Update case notes in ICES regarding the correspondence.</p> <p>Note: If an ICES case is not yet created, case notes should be entered in the WFMS.</p>

3.11.4.4 Add Addressee

The Add Addressee function should be used when sending an exact duplicate of the entire correspondence packet to an Authorized Representative or to a third party. If an ICES case exists, Authorized Representatives are updated in the WFMS based on information contained in the ICES case. If an ICES case is not yet created, the Authorized Representatives are determined based on information contained in the WFMS case.

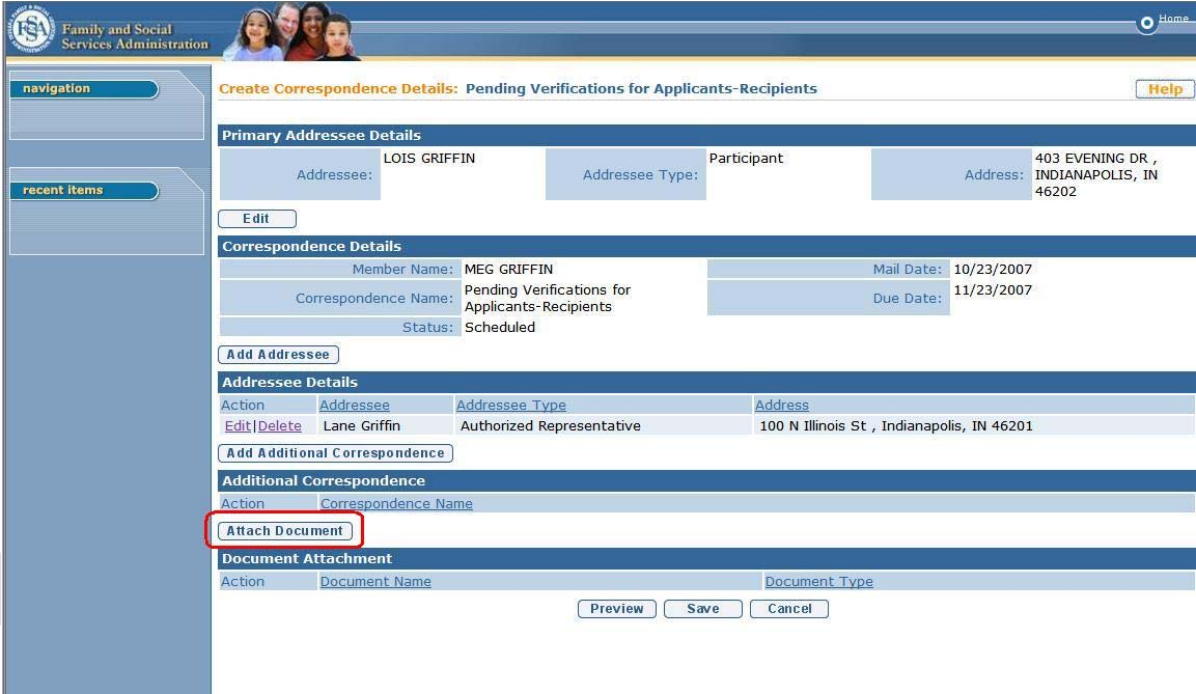
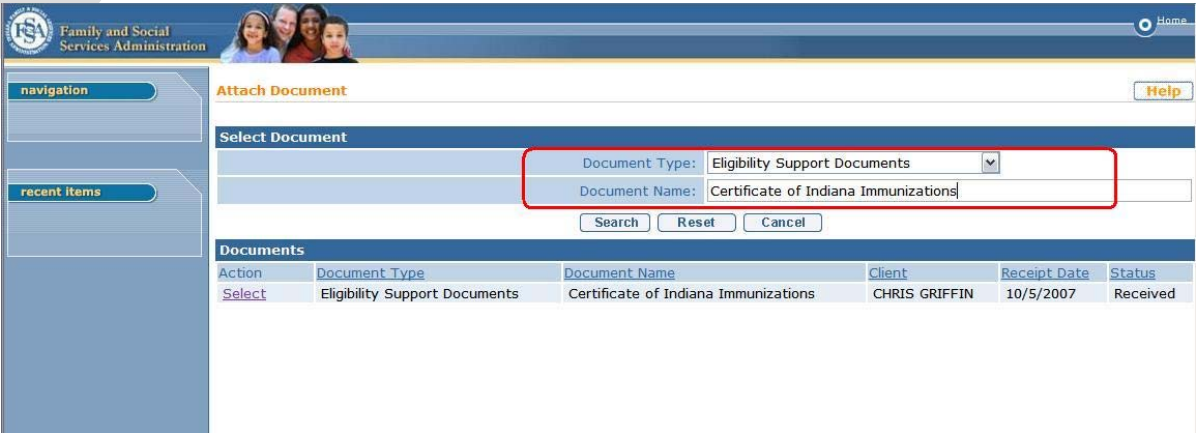
Step	Add Addressee
1.	<p>From the Create Correspondence Details page, click <i>Add Addressee</i>.</p> 
	<p>The WFMS displays the Add Addressee page.</p>
2.	<p>Using the drop down box, select the Addressee Type (Participant, Authorized Representative, or Third Party).</p> 

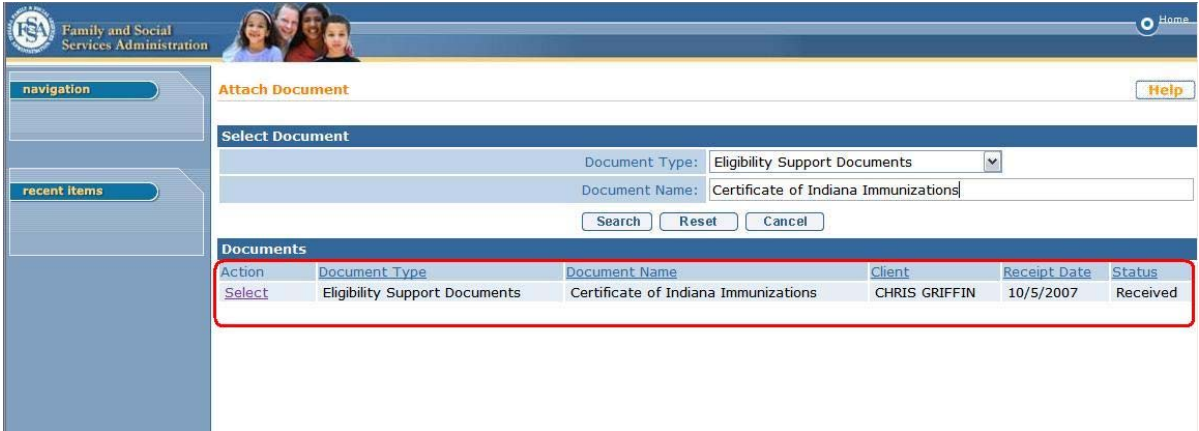
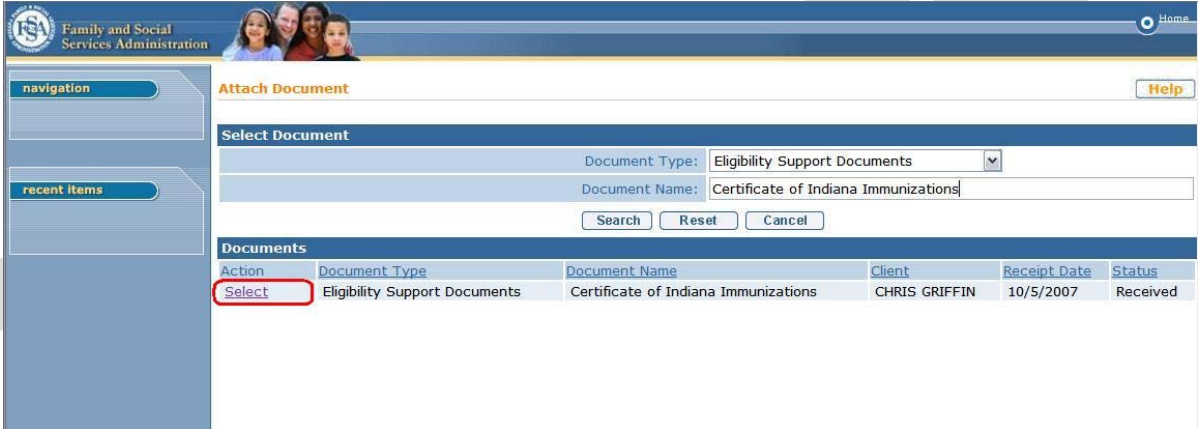
Step	Add Addressee
<p>3.</p>	<p>Using the drop down box, select the Addressee Name. Note: This field is only required if Participant is selected as Addressee Type.</p>  <p>The screenshot shows the 'Add Addressee' form in the Family and Social Services Administration system. The 'Addressee Type' is set to 'Participant'. Under the heading 'If Address Type is Participant, select the Member Name', the 'Addressee Name' dropdown menu is highlighted with a red box and displays 'CHRIS GRIFFIN'. Below this, there is a section for 'Enter Address Details for Third Party or Authorized Representative' with fields for Address Line 1, Address Line 2, City, State, and Zip. The 'Submit' and 'Cancel' buttons are at the bottom.</p>
<p>4.</p>	<p>If Third Party or Authorized Representative is selected as the Addressee Type, enter the Addressee Name (e.g. McDonalds, Wal-Mart, Fifth Third Bank, etc).</p>  <p>The screenshot shows the 'Add Addressee' form with 'Authorized Representative' selected as the 'Addressee Type'. Under the heading 'If Address Type is Third Party or Authorized Representative', the 'Addressee Name' text input field is highlighted with a red box. The address detail section and 'Submit/Cancel' buttons are also visible.</p>

Step	Add Addressee
<p>5.</p>	<p>Enter Address Details for the Third Party or Authorized Representative. If an address has been changed in ICES but has not yet been updated in the WFMS case, enter the applicant/Client's new address here if WFMS mailing address does not agree with the current mailing address in ICES, use this screen to enter current mailing address .</p> <p>Note: Updating addresses on this screen does not update the address information in the WFMS or ICES. If an ICES case exists, update the appropriate ICES screen with the correct information. If an ICES case does not yet exist, update the appropriate WFMS screen.</p> 
<p>6.</p>	<p>Once all addressee details have been entered, click <i>Submit</i>.</p>  <p>The WFMS displays the Create Correspondence Details page with the newly added addressee listed under the Addressee Details cluster. Repeat Steps 1-6 as necessary to add additional addressees.</p>
<p>7.</p>	<p>Continue creating the correspondence at Step 24 of Section 3.11.4.3, Create Correspondence in the WFMS.</p>

3.11.4.5 Attach Document

The Attach Document function should be used when a document indexed to an application, case or Client is to be included in the outbound correspondence. Certain forms/notices require a release of information form to be included in the outbound correspondence packet. Be sure to attach any necessary release of information forms in accordance with policy.

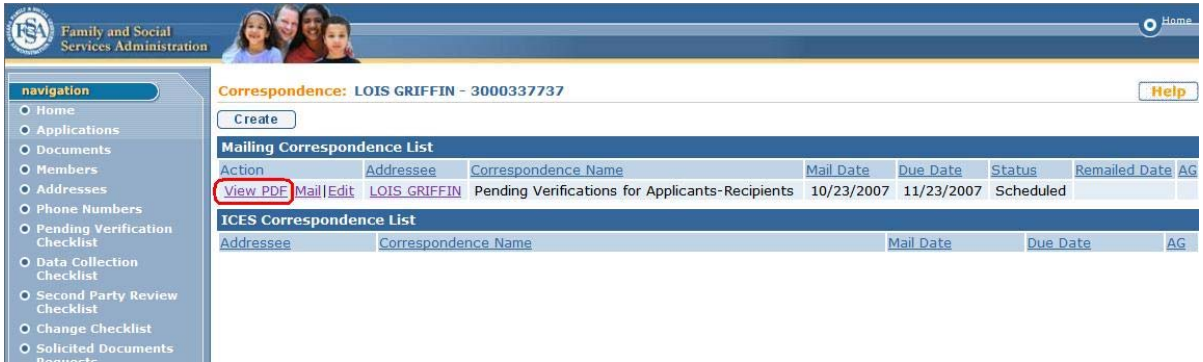
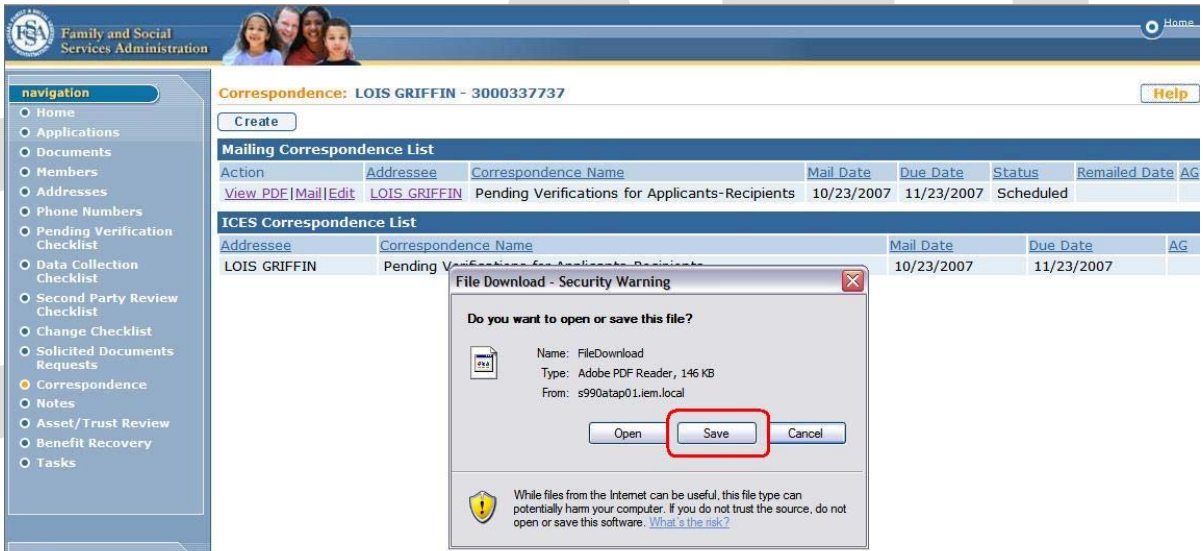
Step	Attach Document
1.	<p>From the Create Correspondence Details page, click <i>Attach Document</i>.</p>  <p>The WFMS displays the Attach Document page.</p>
2.	<p>Identify the document to be included in the outbound correspondence packet by using the drop down box. Select the Document Type. Enter the Document Name.</p> 

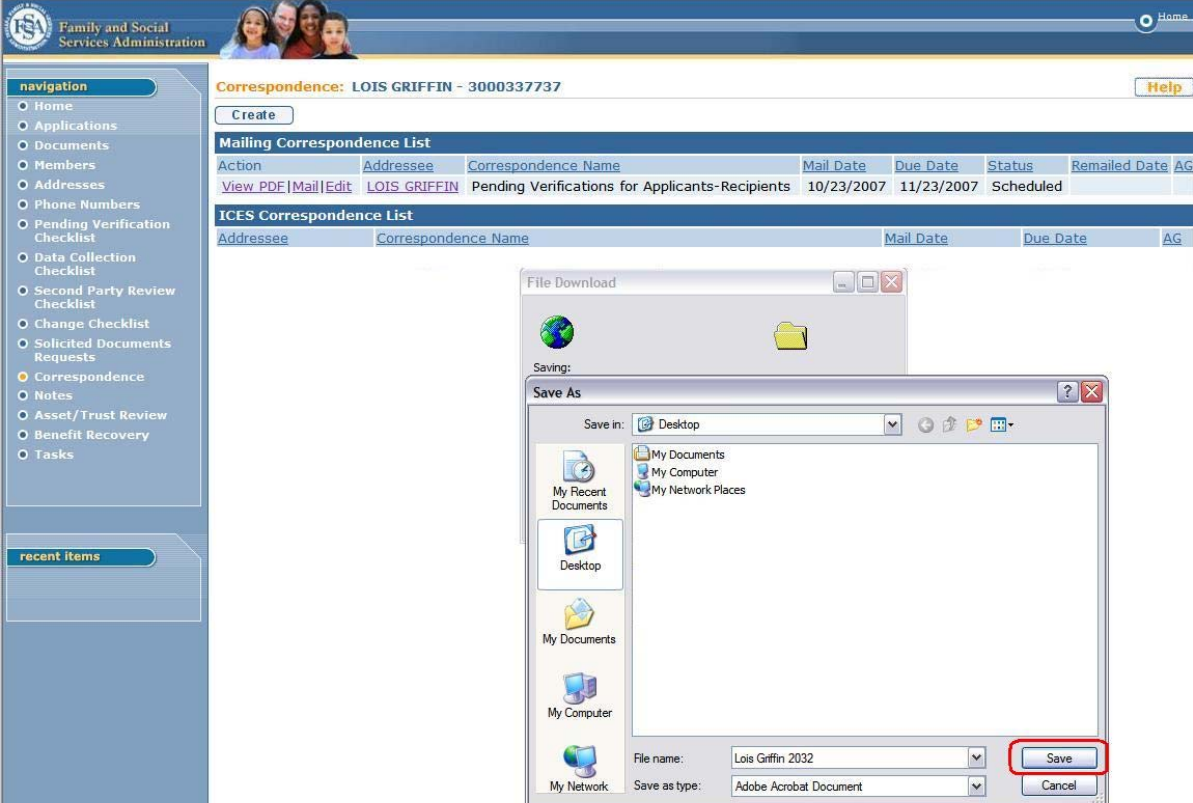
Step	Attach Document
<p>3.</p>	<p>Click <i>Search</i>.</p> <p>The WFMS searches the documents indexed to the application or case. The results of the search (based on criteria entered) populate under the Documents cluster.</p> 
<p>4.</p>	<p>Click <i>Select</i> to designate the document to be attached.</p>  <p>The WFMS includes an image of the document selected in the correspondence packet and displays the Create Correspondence Details page with the attached document listed under the Document Attachment cluster. Repeat Steps 1-4 as necessary to attach additional documents.</p>
<p>5.</p>	<p>Continue creating the correspondence at Step 28 of Section 3.11.4.3, Create Correspondence in the WFMS.</p>

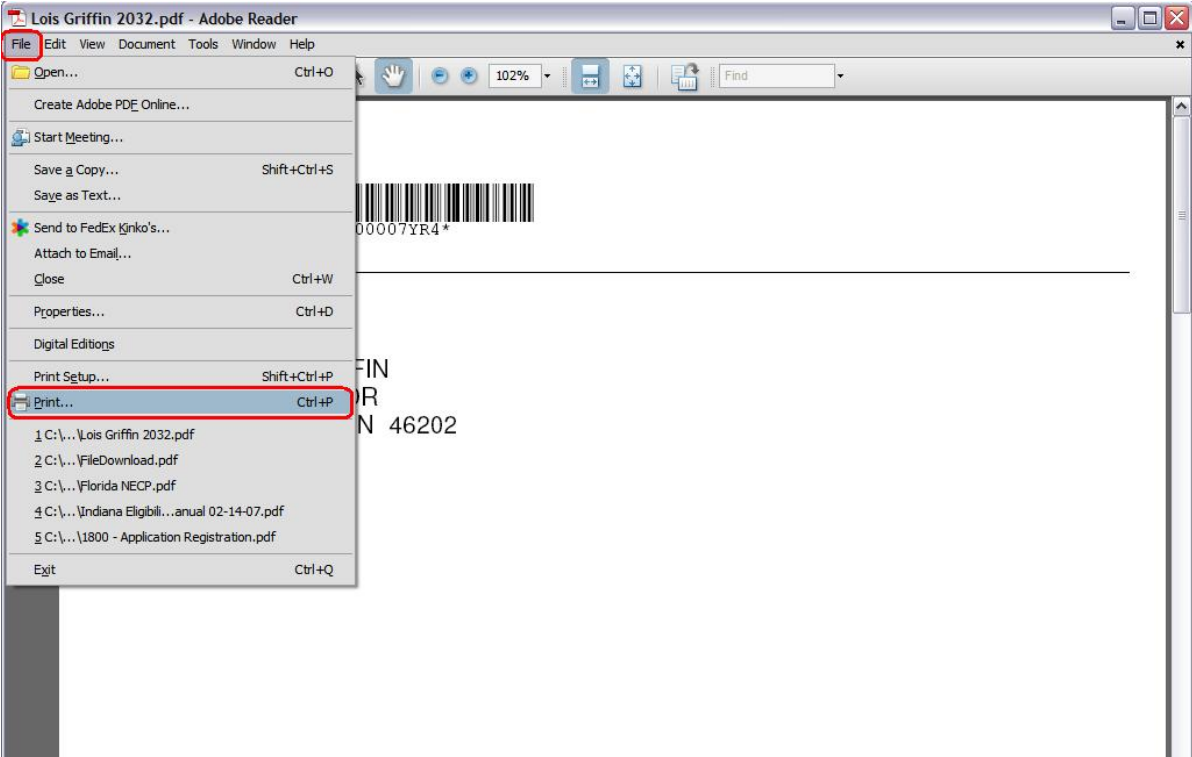
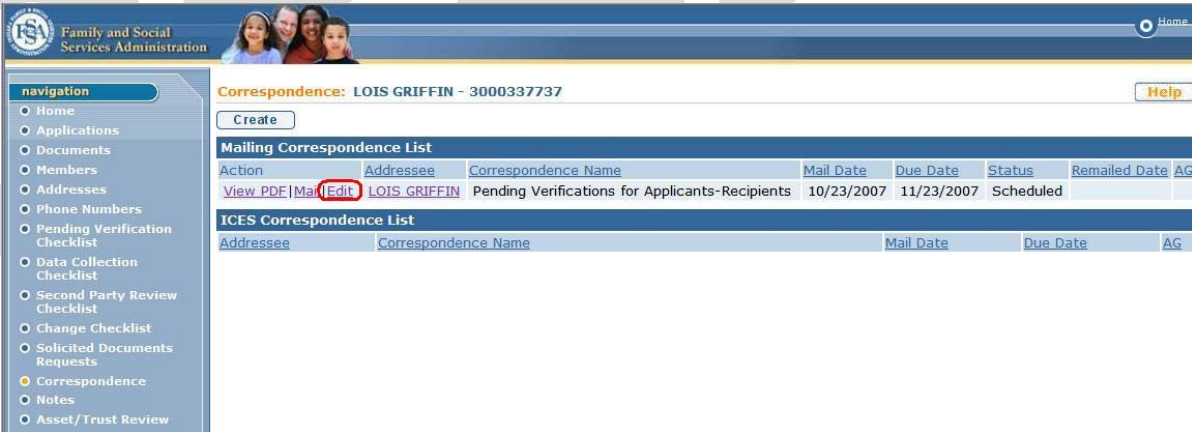
3.11.4.6 Print Correspondence

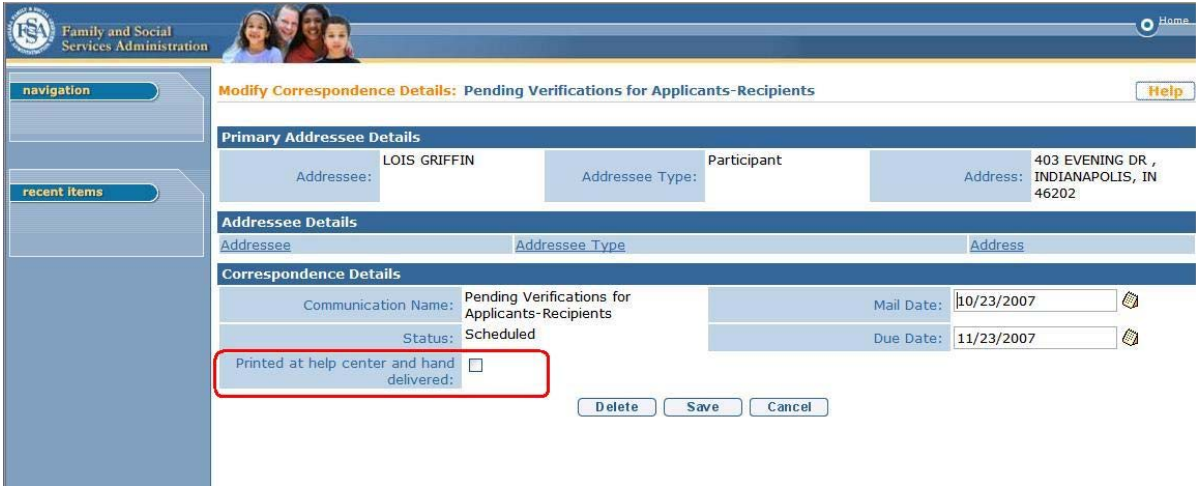
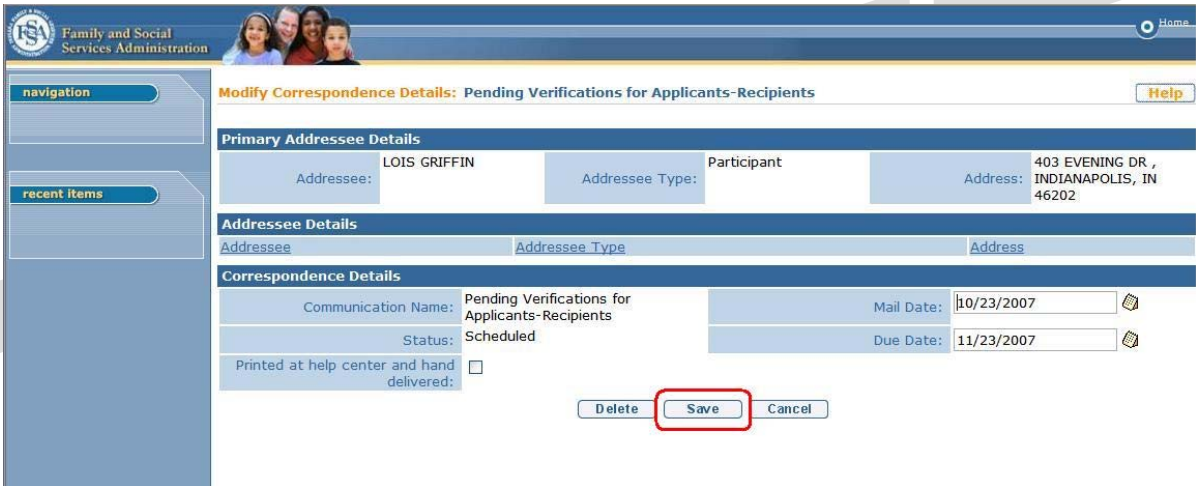

This step links from Step 30 of Section 3.11.4.3, Create Correspondence in the WFMS.

All correspondence is mailed by default. If the correspondence packet is printed locally and the status is updated to “Printed,” the correspondence packet is not mailed. This feature is only used in the Help Center.

Step	Print Correspondence
1.	<p>From the Correspondence Page, click View PDF next to the correspondence packet to be printed.</p>  <p>The WFMS displays a File Download box.</p>
2.	<p>Click Save.</p>  <p>The WFMS displays a Save As box.</p>

Step	<h3>Print Correspondence</h3>
3.	<p>Choose a location to save the file to the local computer. Enter a file name if desired. Click Save.</p>  <p>The WFMS saves the PDF file to the designated location.</p>


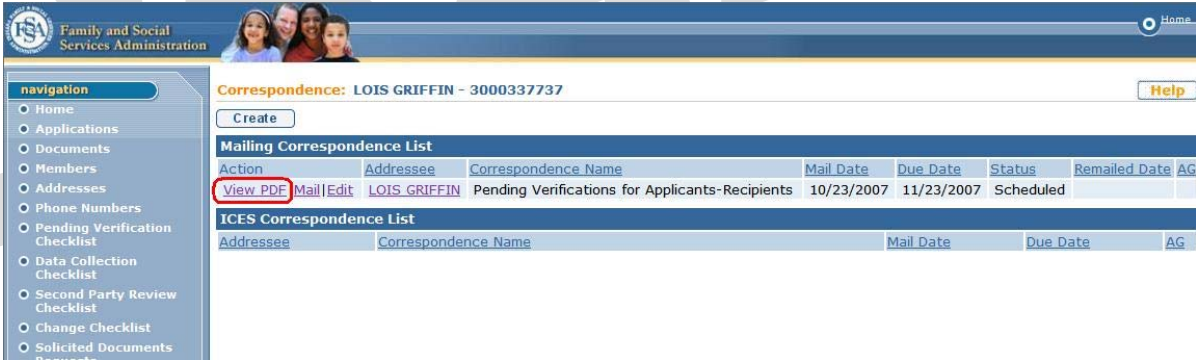
Step	Print Correspondence
4.	<p>Open the PDF file. Click File, Print to print the correspondence packet to the local printer.</p> 
5.	<p>All correspondence is mailed by default, therefore it is necessary to update the status to “Printed” which will stop the correspondence packet from being mailed. From the Correspondence page, click Edit.</p>  <p>The WFMS displays the Modify Correspondence Details page.</p>

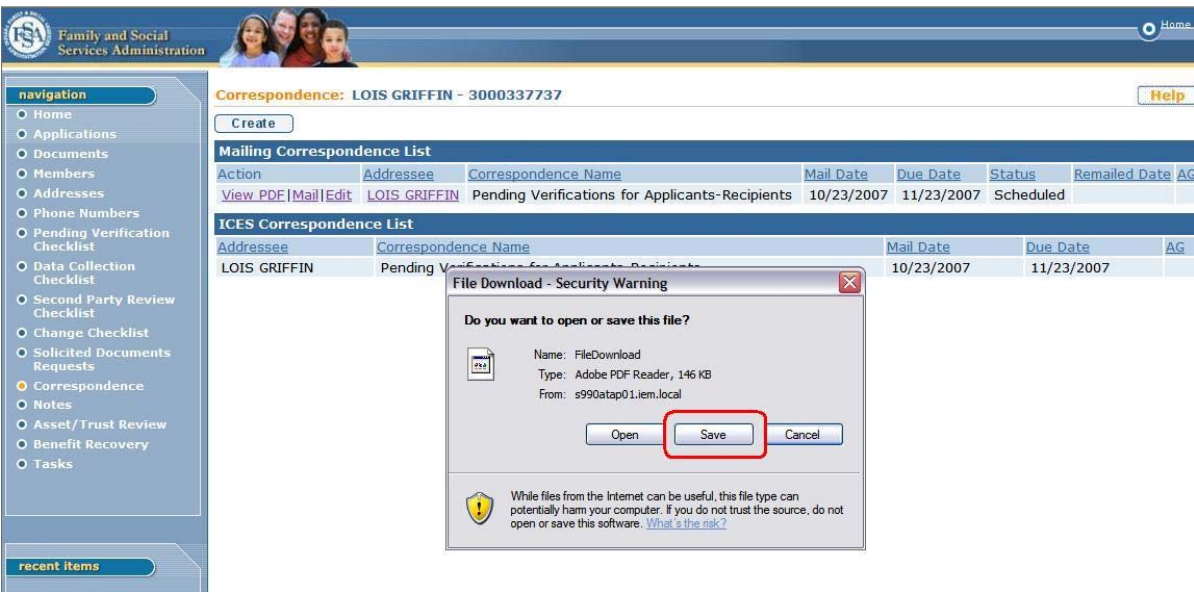
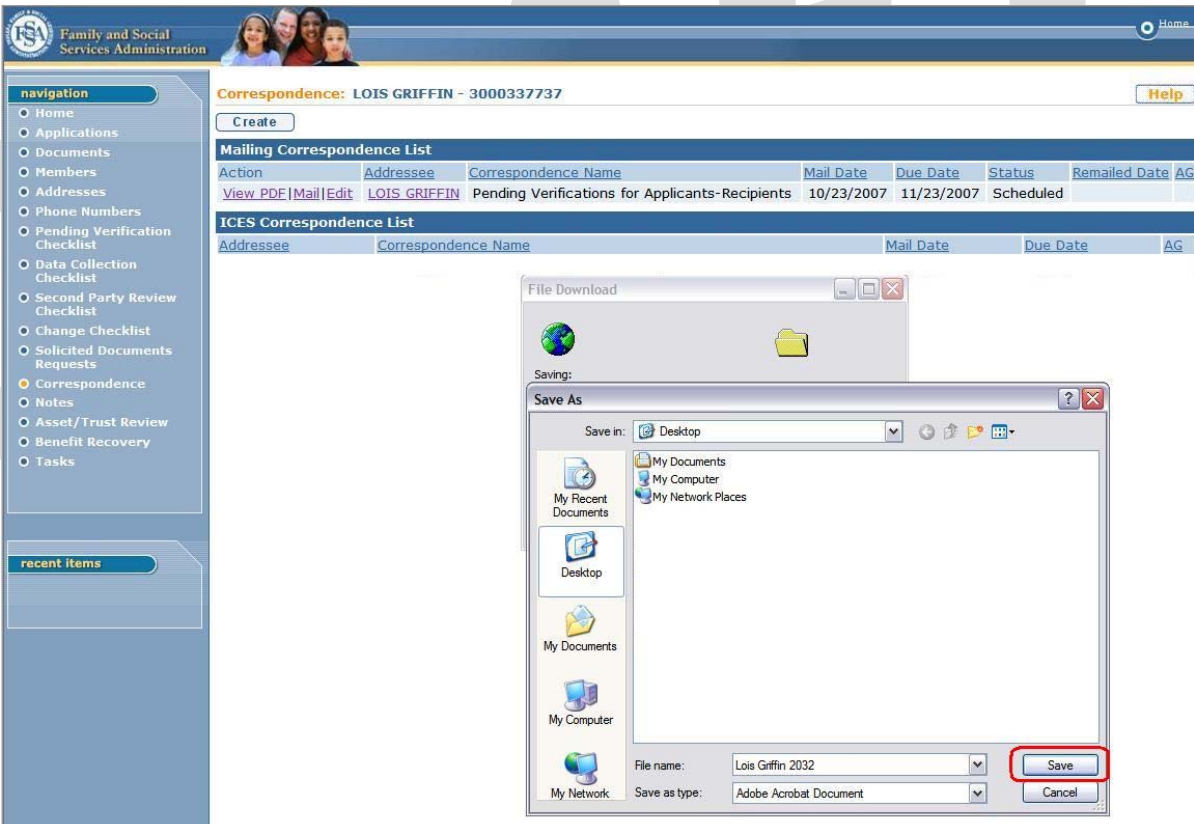
Step	Print Correspondence
6.	<p>Mark the box Printed at help center and hand delivered.</p>  <p>The screenshot shows the 'Modify Correspondence Details' page. The 'Printed at help center and hand delivered' checkbox is highlighted with a red box.</p>
7.	<p>Click Save.</p>  <p>The screenshot shows the 'Modify Correspondence Details' page with the 'Save' button highlighted. Below this is a screenshot of the 'Correspondence' page showing the status updated to 'Printed'.</p> <p>The WFMS displays the Correspondence page with the status updated to “Printed.”</p>  <p>The screenshot shows the 'Correspondence' page with the status updated to 'Printed'.</p>

3.11.4.7 View Correspondence History in the WFMS

The Correspondence page in the WFMS displays a complete history of all correspondence generated from the WFMS. If more than one form/notice is included in the outbound correspondence packet, not all forms/notices included are listed as individual line items. Instead, only the first form/notice selected during the Create Correspondence process is listed as the Correspondence Name for the entire packet. Therefore it may be necessary to view the correspondence packet to determine if additional forms/notices are included.

Notices generated from ICES are shown with limited line item detail on the Correspondence page in the WFMS. Notice text is available only in ICES for notices generated from ICES.


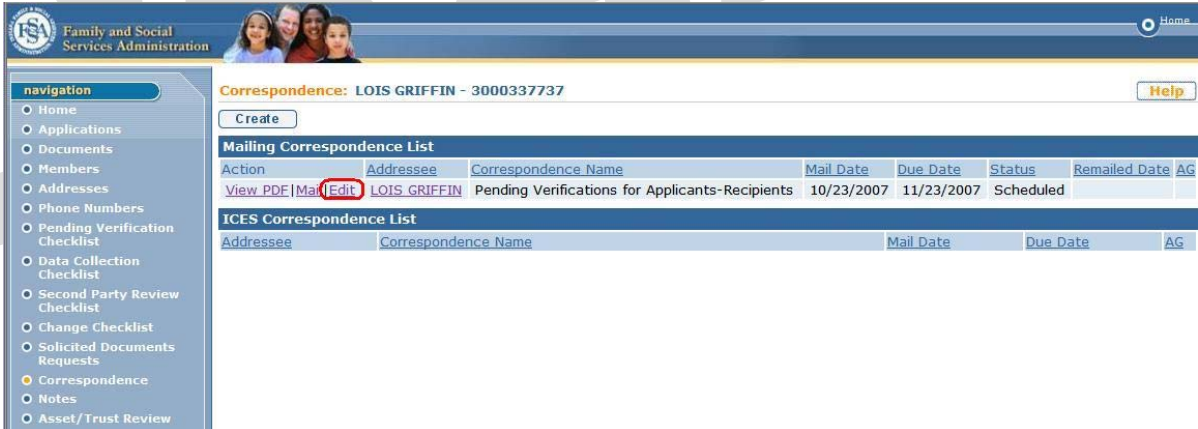
Step	View Correspondence History in the WFMS
1.	<p>From the Application or Case Home page, click <i>Correspondence</i> from the left Navigation bar.</p>  <p>The WFMS displays the Correspondence page.</p>
2.	<p>From the Correspondence Page, click View PDF next to the correspondence packet to be viewed. If the form/notice has been sent from ICES, refer to Section 3.11.4.10, Re-mail Correspondence in ICES.</p>  <p>The WFMS displays a File Download box.</p>

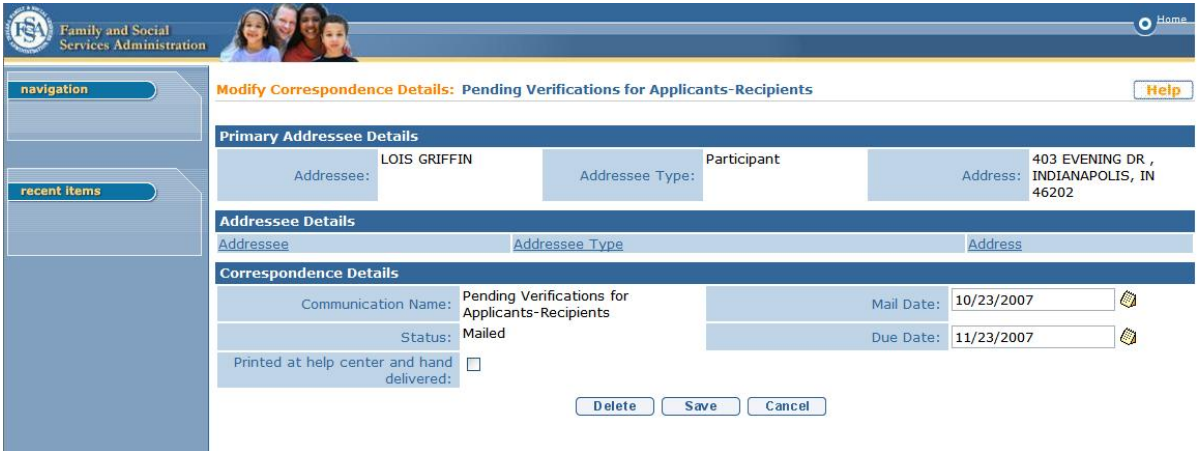
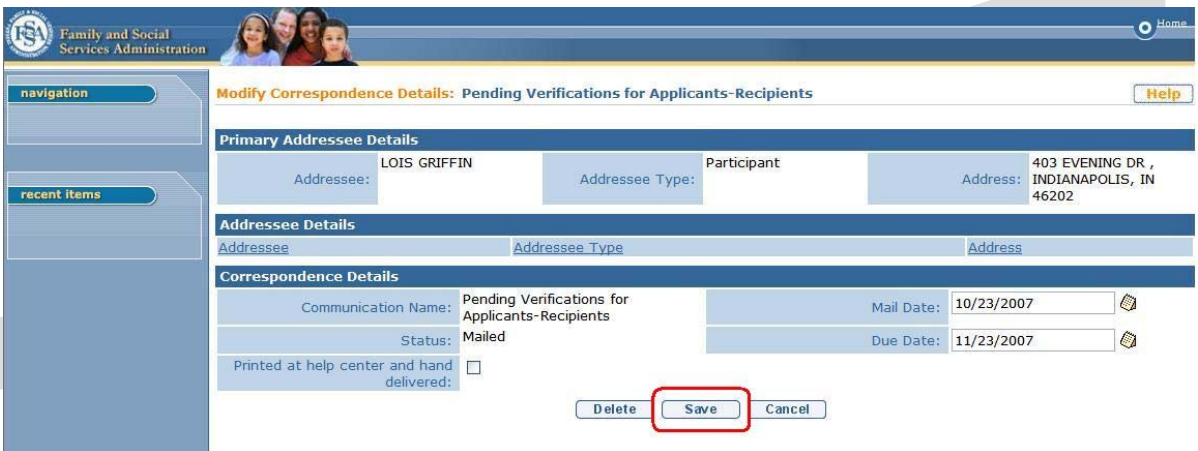
Step	View Correspondence History in the WFMS
3.	<p>Click Save.</p>  <p>The WFMS displays a Save As box.</p>
4.	<p>Choose a location to save the file to the local computer. Enter a file name if desired. Click Save.</p>  <p>The WFMS saves the PDF file to the designated location.</p>
5.	<p>Open the PDF file to view the entire correspondence packet.</p>

Step	View Correspondence History in the WFMS
6.	<ul style="list-style-type: none"> To re-mail a copy of the correspondence, refer to Section 3.11.4.10, Re-mail Correspondence in the WFMS. To delete the correspondence, refer to Section 3.11.4.9, Delete Correspondence.

3.11.4.8 Edit Correspondence in the WFMS

Correspondence with a status of “Mailed” or “Printed” may not be modified; only correspondence with a status of “Scheduled” may be modified.

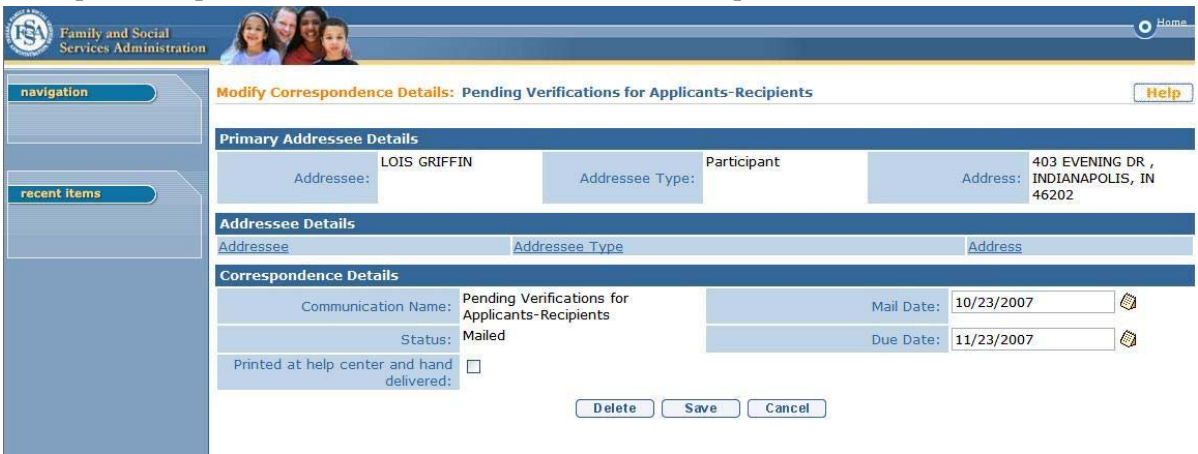


Step	Edit Correspondence in the WFMS
1.	<p>From the Application or Case Home page, click <i>Correspondence</i> from the left Navigation bar.</p>  <p>The WFMS displays the Correspondence page.</p>
2.	<p>Click <i>Edit</i> next to the form/notice to be modified. Only correspondence with a status of “Scheduled” can be modified.</p>  <p>The WFMS displays the Modify Correspondence Details page.</p>

Step	Edit Correspondence in the WFMS
3.	<p>Edit all fields as necessary.</p> 
4.	<p>Once all modifications have been made, click <i>Save</i>.</p>  <p>The WFMS displays the Correspondence page.</p>

3.11.4.09 Delete Correspondence in the WFMS



Correspondence with a status of “Mailed” or “Printed” may not be deleted; only correspondence with a status of “Scheduled” may be deleted.

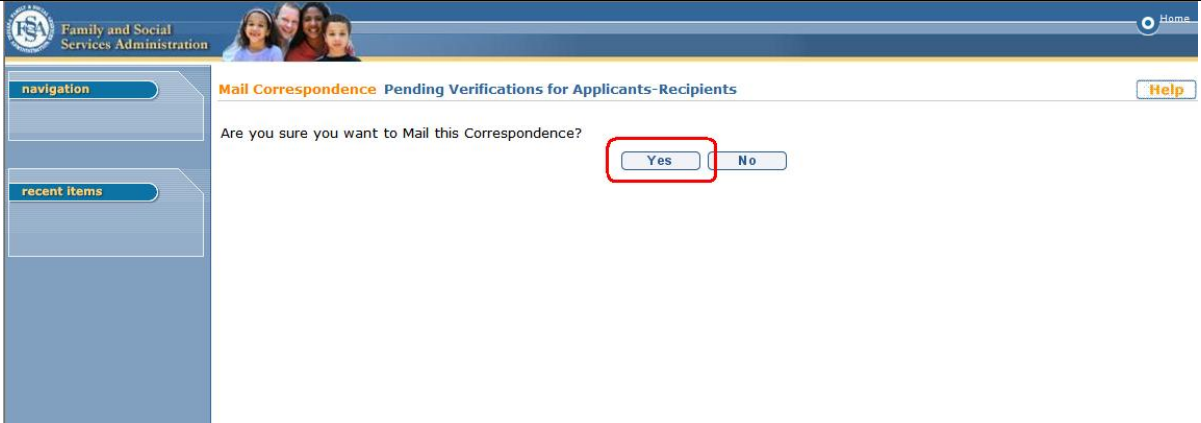
Step	Delete Correspondence in the WFMS
1.	<p>From the Application or Case Home page, click <i>Correspondence</i> from the left Navigation bar.</p>  <p>The WFMS displays the Correspondence page.</p>
2.	<p>Click <i>Edit</i> next to the correspondence to be deleted. Only correspondence with a status of “Scheduled” may be deleted.</p>  <p>The WFMS displays the Modify Correspondence Details page.</p>

Step	Delete Correspondence in the WFMS
3.	<p>Review the correspondence details to confirm this correspondence is to be deleted. To view the entire correspondence packet, refer to Section 3.11.4.7, View Correspondence in the WFMS.</p> 
4.	<p>Click <i>Delete</i>.</p>  <p>The WFMS displays the Delete Correspondence Confirmation page.</p>
5.	<p>Click <i>Yes</i>.</p>  <p>The WFMS cancels the scheduled mailing of the correspondence; no record is retained in the application/case history. The WFMS displays the Correspondence page.</p>

3.11.4.10 Re-mail Correspondence in the WFMS

An internal user is able to re-mail a copy of a notice previously sent from the WFMS if a Client, authorized representative, or third party requests a copy.

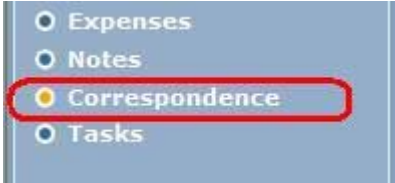

Step	Re-mail Correspondence in the WFMS
1.	<p>From the Application or Case Home page, click <i>Correspondence</i> from the left Navigation bar.</p>  <p>The WFMS displays the Correspondence page.</p>
2.	<p>Identify the correspondence to be re-mailed. All correspondence is listed under the first form/notice created. Therefore, it may be necessary to view the correspondence packet by clicking <i>View</i>. Refer to Section 3.11.4.7, View Correspondence History in the WFMS.</p>
3.	<p>To re-mail a copy of the correspondence packet, click <i>Mail</i> from the Correspondence page.</p>  <p>The WFMS displays the Mail Correspondence confirmation page.</p>
4.	<p>Click Yes.</p>

Step	Re-mail Correspondence in the WFMS
	<div data-bbox="264 237 1458 657"></div> <p data-bbox="264 663 1458 739">The WFMS re-mails a copy of the correspondence and displays the Correspondence page with the Re-mailed date field populated.</p>

DRAFT

3.11.4.11 Create Correspondence from the File Server

In most instances, forms on the file server are used for outbound correspondence. Certain forms, such as the Identity Affidavit for Children Under 16 form is created as an attachment to the case. This section describes the steps for creating correspondence from the shared drive on the File Server. Section 3.11.4.12 describes the steps for creating an attachment such as the Identity Affidavit for Children Under 16 form.

Step	Create Correspondence from the File Server
1.	<p>From the Application or Case Home page, click <i>Correspondence</i> from the left Navigation bar.</p>  <p>The WFMS displays the Correspondence page.</p>
2.	<p>Click <i>Create</i>.</p>  <p>The WFMS displays the Select Correspondence page.</p>

Step**Create Correspondence from the File Server**

3.

Select All or the applicable Assistance Group.

FSSA - WFMS Select Correspondence Type - Microsoft Internet Explorer

Address: https://s9901pap02.iem.local/HCSSApplication/en_US/Correspondence_selectCorrespondenceTypeAction.do

Family and Social Services Administration

Select Correspondence Type

Program Selection

Assistance Group: All

Search Cancel

Select the correspondence type (Number of Items: 42)

Action	Document ID	Name
Select View	Auth Rep	Authorized Representative Form
Select View	Aux Ben	Auxiliary Benefits Notice
Select View	Blank	Blank Template
Select View	Cert Assign	Client Certification & Assignment
Select View	DFR CCDF	DFR CCDF Referral
Select View	Diag Cert	Diagnosis Certification Form
Select View	FI 0007	Notice Of Interview/Appointment
Select View	FI 0009	Notice Regarding Rights and Responsibilities
Select View	FI 0014	Authorization for Release of Financial Information
Select View	FI 0022	Shelter Collateral Request
Select View	FI 0042	Notice of Missed Interview
Select View	FI 0065	Request for Earnings Information
Select View	FI 0619C	Notice and Certificate of Action- TANF
Select View	FI 0619M	Notice and Certificate of Action Medical Assistance
Select View	FI 0775	Life Insurance Verification
Select View	FI 2030	Application For Hoosier Healthwise
Select View	FI 2030S	Hoosier Healthwise Para Ninos Y Mujeres
Select View	FI 2032	Pending Verifications for Applicants/Perinients

4.

Click Search.

The forms/notices associated with the chosen assistance group are displayed under the Select the Correspondence Type cluster. The correspondence list can be sorted in alphabetical order by clicking Name at the top of the column. The list can also be sorted in order of form numbers by clicking Document ID.

Family and Social Services Administration

Select Correspondence Type


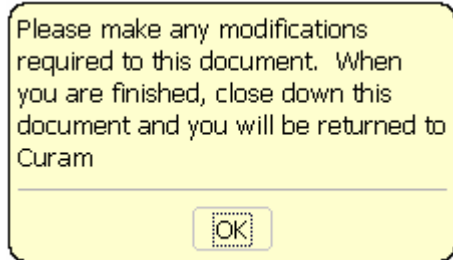
Program Selection

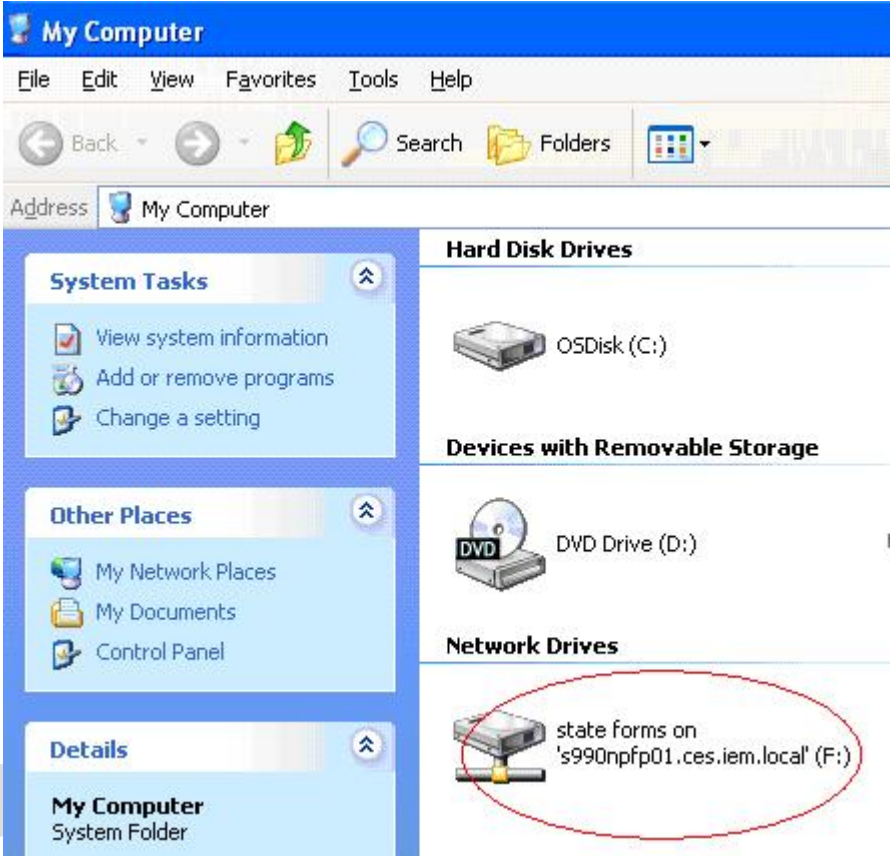
Assistance Group: All

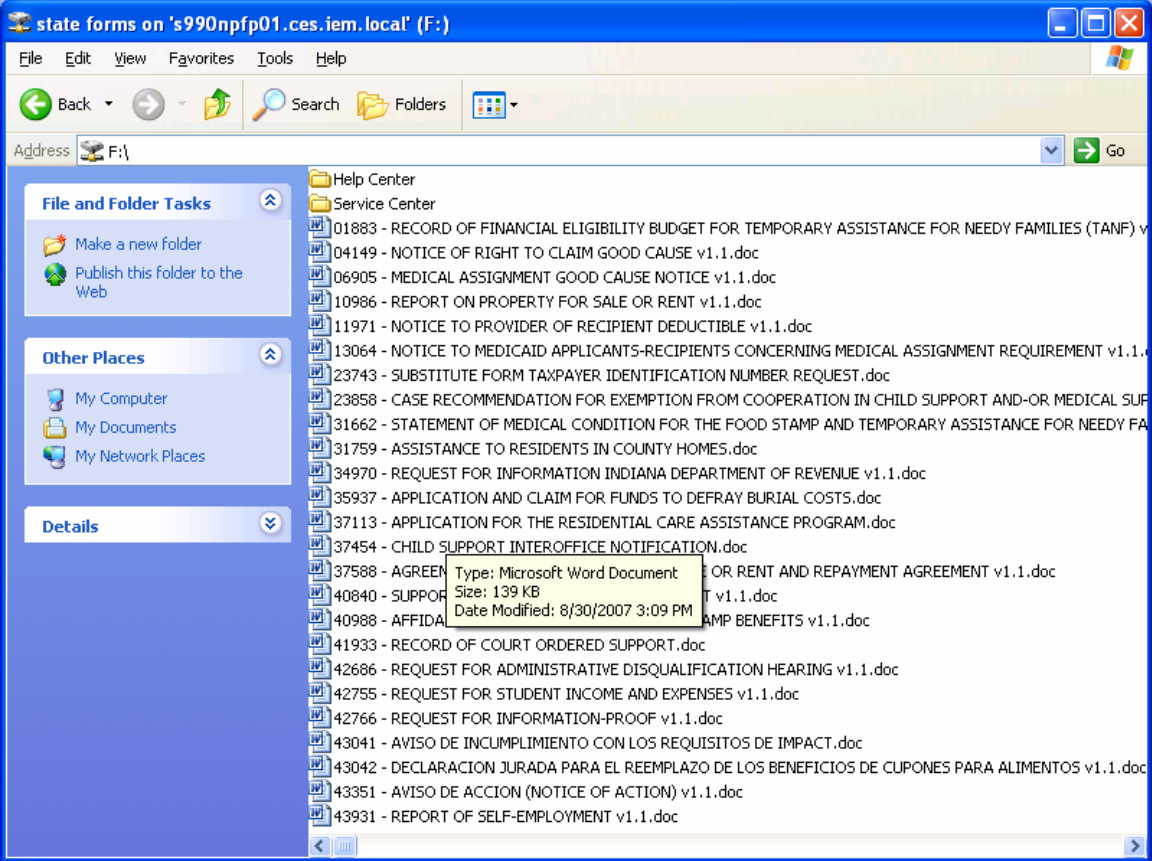
Search Cancel

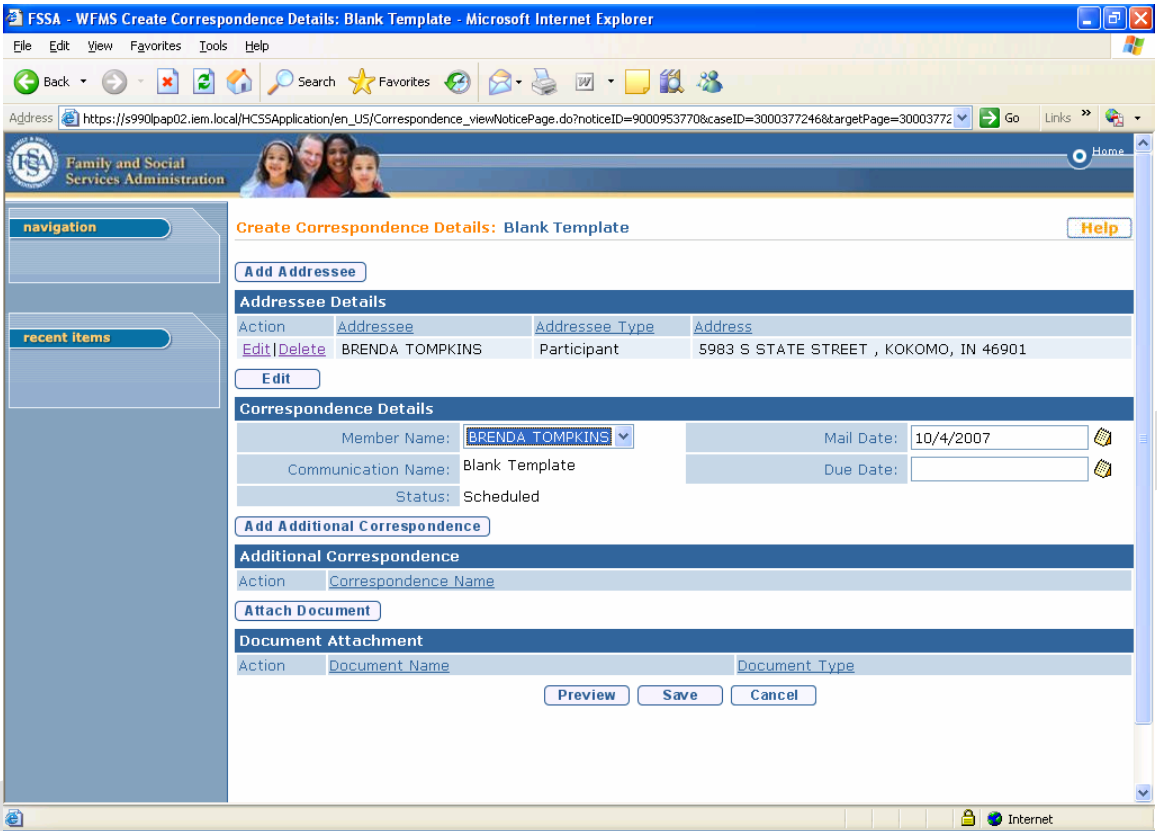
Select the correspondence type (Number of Items: 24)

Action	Document ID	Name
Select View	Auth Rep	Authorized Representative Form
Select View	Blank	Blank Template
Select View	Cert Assign	Client Certification & Assignment
Select View	DFR CCDF	DFR CCDF Referral
Select View	FI 0007	Notice Of Interview/Appointment
Select View	FI 0009	Notice Regarding Rights and Responsibilities
Select View	FI 0014	Authorization for Release of Financial Information
Select View	FI 0022	Shelter Collateral Request
Select View	FI 0042	Notice of Missed Interview
Select View	FI 0065	Request for Earnings Information

Step	Create Correspondence from the File Server																								
5.	<p>Click <i>Select</i> next to Blank Template (if the form you are sending is not displayed on the list.).</p>  <table><thead><tr><th>Action</th><th>Document ID</th><th>Name</th></tr></thead><tbody><tr><td>Select View</td><td>Auth Rep</td><td>Authorized Representative Form</td></tr><tr><td>Select View</td><td>Blank</td><td>Blank Template</td></tr><tr><td>Select View</td><td>Cert Assign</td><td>Client Certification & Assignment</td></tr><tr><td>Select View</td><td>DFR CCDF</td><td>DFR CCDF Referral</td></tr><tr><td>Select View</td><td>FI 0007</td><td>Notice Of Interview/Appointment</td></tr><tr><td>Select View</td><td>FI 0009</td><td>Notice Regarding Rights and Responsibilities</td></tr><tr><td>Select View</td><td>FI 0014</td><td>Authorization for Release of Financial Information</td></tr></tbody></table>	Action	Document ID	Name	Select View	Auth Rep	Authorized Representative Form	Select View	Blank	Blank Template	Select View	Cert Assign	Client Certification & Assignment	Select View	DFR CCDF	DFR CCDF Referral	Select View	FI 0007	Notice Of Interview/Appointment	Select View	FI 0009	Notice Regarding Rights and Responsibilities	Select View	FI 0014	Authorization for Release of Financial Information
Action	Document ID	Name																							
Select View	Auth Rep	Authorized Representative Form																							
Select View	Blank	Blank Template																							
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Select View	FI 0007	Notice Of Interview/Appointment																							
Select View	FI 0009	Notice Regarding Rights and Responsibilities																							
Select View	FI 0014	Authorization for Release of Financial Information																							
6.	<p>A form appears; it may contain text that will be replaced when the following steps are completed. The following message may also be displayed. If so, click OK.</p> 																								

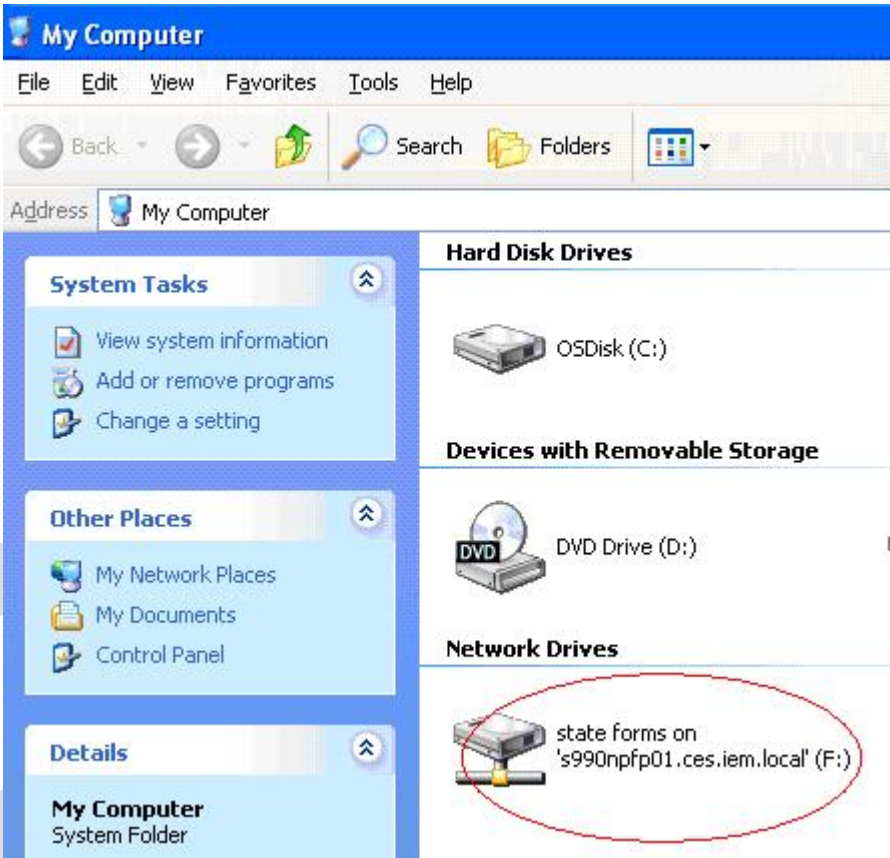
Step	Create Correspondence from the File Server
7.	<p>To access the shared drive from the file server, click Start, click My Computer, and click on State Forms.</p>  <p>The screenshot shows the 'My Computer' window in Windows XP. The left sidebar contains 'System Tasks', 'Other Places', and 'Details'. The main pane is titled 'My Computer' and shows 'System Folder'. On the right, there are sections for 'Hard Disk Drives' (OSDisk (C:)), 'Devices with Removable Storage' (DVD Drive (D:)), and 'Network Drives'. Under 'Network Drives', a drive is listed as 'state forms on 's990npfp01.ces.iem.local' (F:)', which is circled in red.</p>

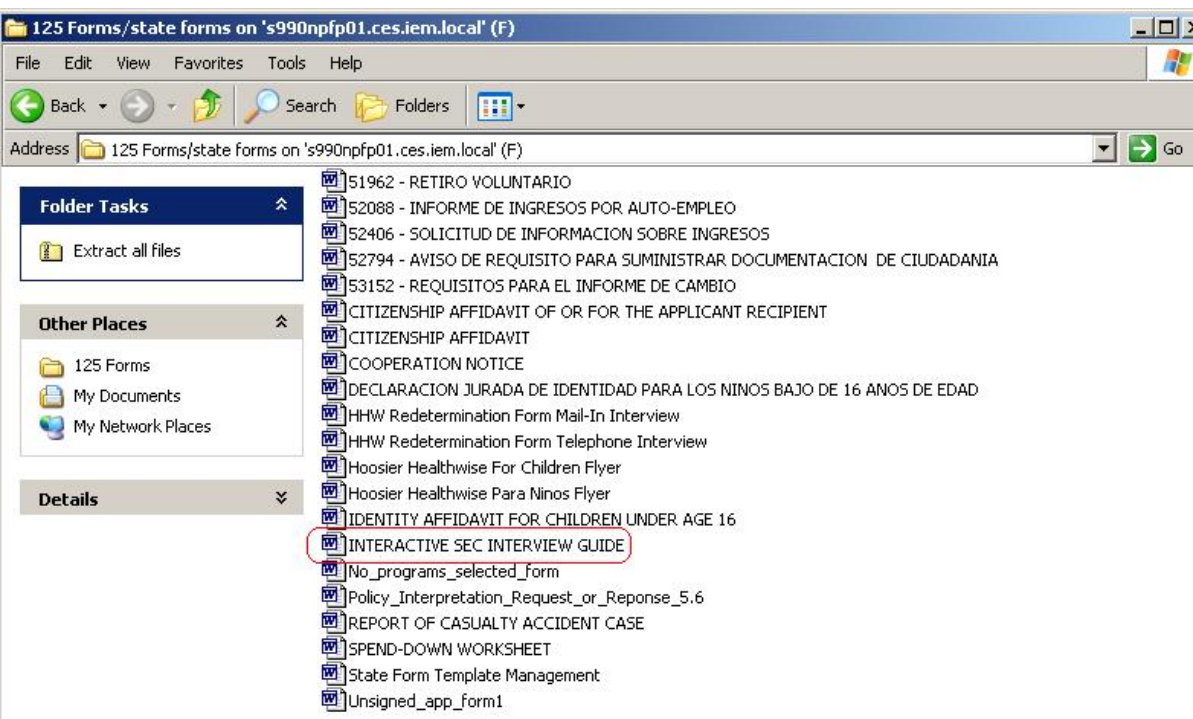
Step	Create Correspondence from the File Server
8.	<p>(If the forms are not displayed as shown below, click View and click List.) Select the form from the list.</p> 
9.	<p>Click to select the form you need to send (or attach to the case).</p> <p>The form displays as Read Only and cannot be updated until saved to your computer or copied and pasted into the blank template (you will know if you get a message.).</p> <p>Save the form to the hard drive of your computer. The form name should be no longer than 35 characters and contain the client name to assist in pulling the correct file. For example, Report on Property for Sale or Rent for client name John Doe could be saved as Report on Property-John Doe.</p>
10.	<p>Enter information in the appropriate sections of the form.</p> <p>Click File, then click Save to save the completed form to a folder under My Documents on the hard drive of your computer; use the Case name in the file name so that the saved file is easier to locate.</p>
11.	<p>While the form is open, click Edit.</p>
12.	<p>Click Select All. All of the text in the form should be highlighted.</p>
13.	<p>Right click and select Copy.</p>
14.	<p>Go to the blank template that has been opened and minimized at the bottom of your screen.</p>
15.	<p>Highlight all of the text in the blank template. Right click and select Paste. The information from the form is now pasted into the blank template form.</p>

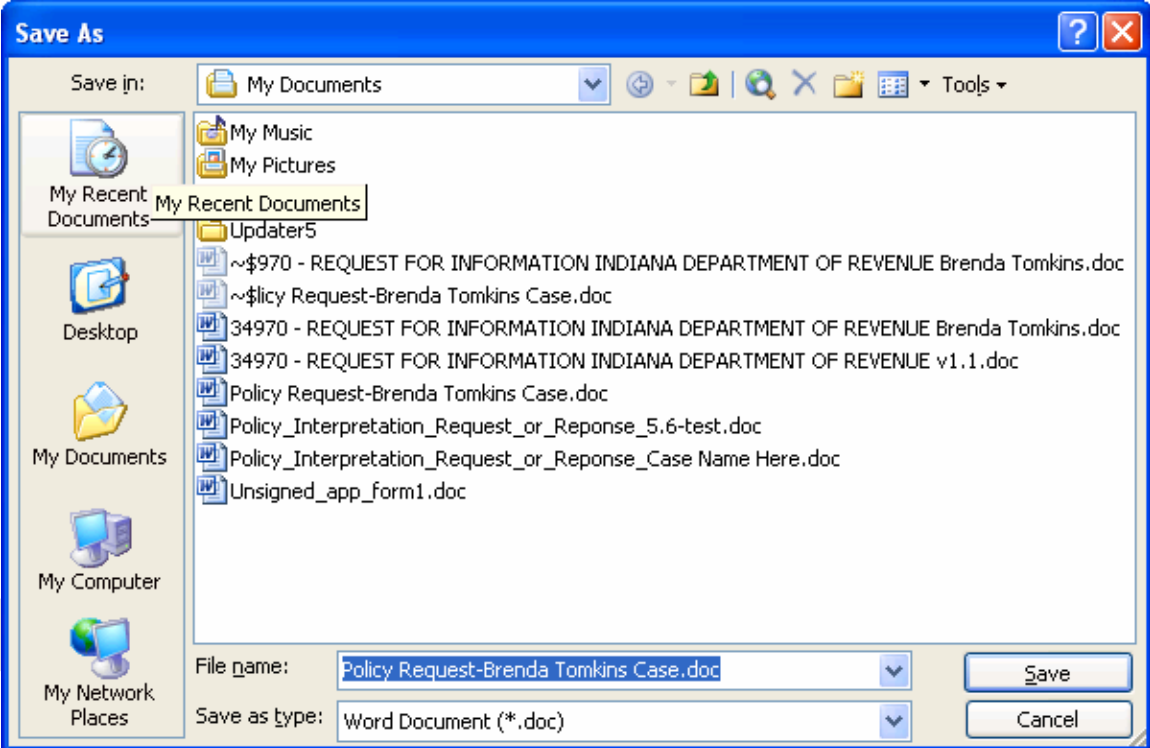
Step	Create Correspondence from the File Server
16.	<p>Close the blank form by clicking the X in the upper right corner or clicking File, then Close. The follow screen appears.</p> 
17.	<p>Continue creating the correspondence at Step 7 of Section 3.11.4.3, Create Correspondence in the WFMS.</p>

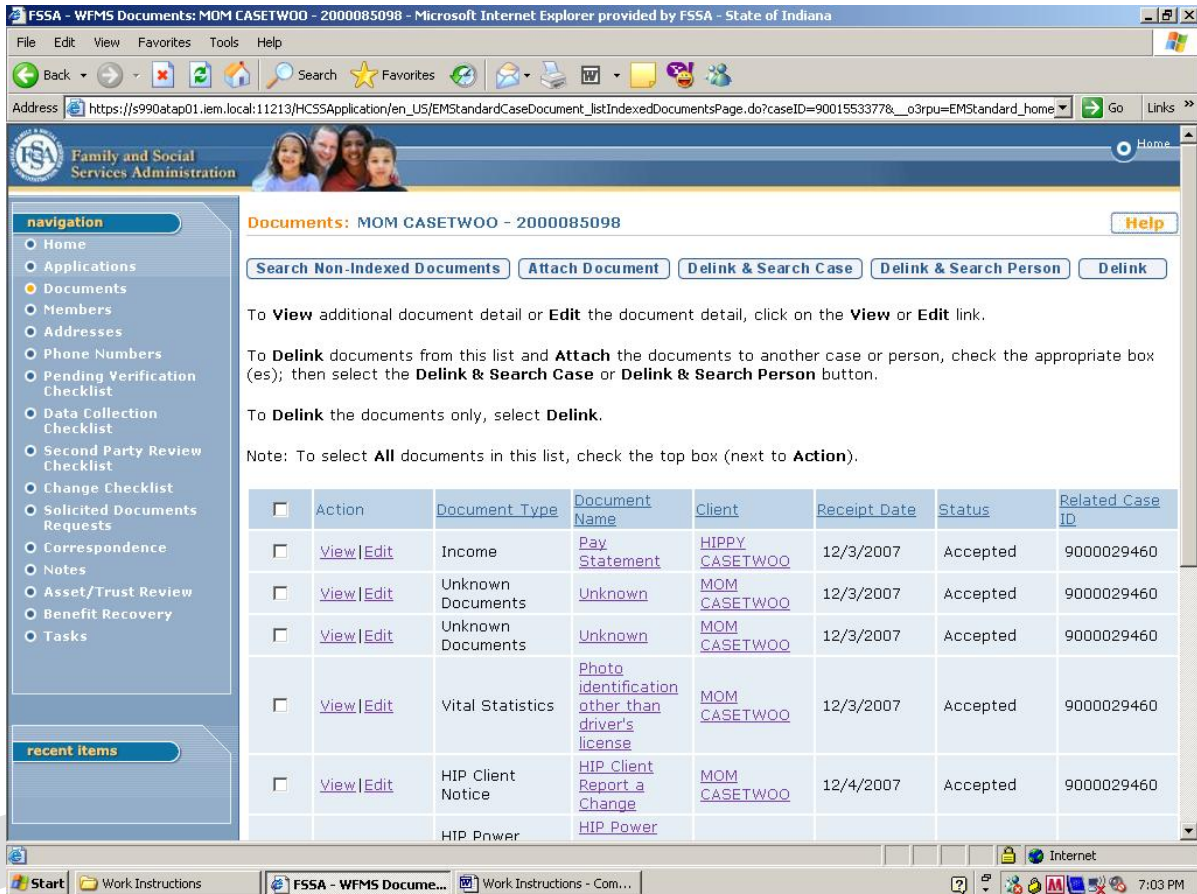

3.11.4.12 Creating an Attachment from the File Server


Certain forms, such as the SEC Interview Guide is accessed from the shared drive on the File Server. Instead of creating these forms as correspondence, the user creates them as attachments to the case in Documents and then creates tasks for other internal users to process, if necessary..

Step	Create an Attachment from the File Server
1.	<p>When a form such as the Interactive SEC Interview Guide is needed, access the shared drive from the file server, click Start, click My Computer, and click on State Forms.</p>  <p>The screenshot shows the 'My Computer' window in Windows XP. The left sidebar contains 'System Tasks', 'Other Places', and 'Details'. The 'Other Places' section is expanded, showing 'My Network Places', 'My Documents', and 'Control Panel'. The main pane displays 'Hard Disk Drives' (OSDisk (C:)), 'Devices with Removable Storage' (DVD Drive (D:)), and 'Network Drives'. A network drive is listed as 'state forms on 's990npfp01.ces.iem.local' (F:)', which is circled in red.</p>

Step	Create an Attachment from the File Server
2.	<p>(If the forms are not displayed as shown below, click View and click List.)</p> <p>Select the form from the list. To see additional forms listed, use the down arrow on your keyboard.</p> <p>Interactive SEC Interview Guide is listed near the bottom of the list.</p>  <p>The screenshot shows a Windows File Explorer window titled "125 Forms/state forms on 's990npfp01.ces.iem.local' (F)". The address bar shows the path "125 Forms/state forms on 's990npfp01.ces.iem.local' (F)". The left sidebar shows "Folder Tasks" with "Extract all files" and "Other Places" with "125 Forms", "My Documents", and "My Network Places". The main pane displays a list of files with icons and names. The file "INTERACTIVE SEC INTERVIEW GUIDE" is highlighted with a red circle.</p>

Step	Create an Attachment from the File Server
3.	<p>Double Click to select the form you need to attach to the case.</p> <p>The form displays as Read Only and cannot be updated until saved to your computer.</p> <p>Save the form to the hard drive of your computer. The form name should be no longer than 35 characters and contain the client name to assist in pulling the correct file. For example, Policy Request Form for client name Brenda Tomkins could be saved as Policy Request Form-Brenda Tomkins as shown below.</p> 
4.	<p>Enter information in the appropriate sections of the form.</p> <p>Click File, then click Save to save the completed form to the hard drive of your computer, using the Case name so that the document you want to attach is easier to find.</p>

Step	Create an Attachment from the File Server																																																								
5.	<p>From Case Home in WFMS, click Documents in the Left Navigation bar.</p>  <p>Documents: MOM CASE2W00 - 2000085098</p> <p>Search Non-Indexed Documents Attach Document Delink & Search Case Delink & Search Person Delink</p> <p>To View additional document detail or Edit the document detail, click on the View or Edit link.</p> <p>To Delink documents from this list and Attach the documents to another case or person, check the appropriate box (es); then select the Delink & Search Case or Delink & Search Person button.</p> <p>To Delink the documents only, select Delink.</p> <p>Note: To select All documents in this list, check the top box (next to Action).</p> <table><thead><tr><th><input type="checkbox"/></th><th>Action</th><th>Document Type</th><th>Document Name</th><th>Client</th><th>Receipt Date</th><th>Status</th><th>Related Case ID</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Income</td><td>Pay Statement</td><td>HIPPY CASE2W00</td><td>12/3/2007</td><td>Accepted</td><td>9000029460</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Unknown Documents</td><td>Unknown</td><td>MOM CASE2W00</td><td>12/3/2007</td><td>Accepted</td><td>9000029460</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Unknown Documents</td><td>Unknown</td><td>MOM CASE2W00</td><td>12/3/2007</td><td>Accepted</td><td>9000029460</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>Vital Statistics</td><td>Photo identification other than driver's license</td><td>MOM CASE2W00</td><td>12/3/2007</td><td>Accepted</td><td>9000029460</td></tr><tr><td><input type="checkbox"/></td><td>View Edit</td><td>HIP Client Notice</td><td>HIP Client Report a Change</td><td>MOM CASE2W00</td><td>12/4/2007</td><td>Accepted</td><td>9000029460</td></tr><tr><td><input type="checkbox"/></td><td></td><td>HIP Power</td><td>HIP Power</td><td></td><td></td><td></td><td></td></tr></tbody></table>	<input type="checkbox"/>	Action	Document Type	Document Name	Client	Receipt Date	Status	Related Case ID	<input type="checkbox"/>	View Edit	Income	Pay Statement	HIPPY CASE2W00	12/3/2007	Accepted	9000029460	<input type="checkbox"/>	View Edit	Unknown Documents	Unknown	MOM CASE2W00	12/3/2007	Accepted	9000029460	<input type="checkbox"/>	View Edit	Unknown Documents	Unknown	MOM CASE2W00	12/3/2007	Accepted	9000029460	<input type="checkbox"/>	View Edit	Vital Statistics	Photo identification other than driver's license	MOM CASE2W00	12/3/2007	Accepted	9000029460	<input type="checkbox"/>	View Edit	HIP Client Notice	HIP Client Report a Change	MOM CASE2W00	12/4/2007	Accepted	9000029460	<input type="checkbox"/>		HIP Power	HIP Power				
<input type="checkbox"/>	Action	Document Type	Document Name	Client	Receipt Date	Status	Related Case ID																																																		
<input type="checkbox"/>	View Edit	Income	Pay Statement	HIPPY CASE2W00	12/3/2007	Accepted	9000029460																																																		
<input type="checkbox"/>	View Edit	Unknown Documents	Unknown	MOM CASE2W00	12/3/2007	Accepted	9000029460																																																		
<input type="checkbox"/>	View Edit	Unknown Documents	Unknown	MOM CASE2W00	12/3/2007	Accepted	9000029460																																																		
<input type="checkbox"/>	View Edit	Vital Statistics	Photo identification other than driver's license	MOM CASE2W00	12/3/2007	Accepted	9000029460																																																		
<input type="checkbox"/>	View Edit	HIP Client Notice	HIP Client Report a Change	MOM CASE2W00	12/4/2007	Accepted	9000029460																																																		
<input type="checkbox"/>		HIP Power	HIP Power																																																						
6.	<p>Click Attach Document. The Create Attachment page is displayed.</p>  <p>Create Attachment:</p> <p>Select file to attach</p> <p>*File: <input type="text"/> Browse...</p> <p>Details</p> <p>*Document Type: Eligibility Support Documents *Document Name: <input type="text"/></p> <p>Save Save & New Cancel</p>																																																								
7.	Click Browse to locate the file you just saved to the hard drive.																																																								
8.	When you locate the file, click Open.																																																								

Step	Create an Attachment from the File Server														
9.	<p>Select the correct Document Type (such as Eligibility Support Forms for the example used in these instructions). Then click Search to display the document names for the selected Document Type. Click Select to choose the correct Document Name.</p> <p>Select Document Name</p> <p>Select Document Name</p> <div> <div>Document Type: Eligibility Support Documents</div> <div>Document Name: </div> <div> <div>Search</div> <div>Reset</div> <div>Cancel</div> </div> </div> <table> <tr> <th>Action</th><th>Document Name</th></tr> <tr> <td>Select</td><td>1619-SSI Status Verification</td></tr> <tr> <td>Select</td><td>Acuerdo de Responsabilidad Personal</td></tr> <tr> <td>Select</td><td>Affidavit For Replacement Of Food Stamp Benefits</td></tr> <tr> <td>Select</td><td>Application Document Cover Sheet</td></tr> <tr> <td>Select</td><td>Application Document Cover Sheet (Spanish)</td></tr> <tr> <td>Select</td><td>Application for Assistance - Part 2 (CAF)</td></tr> </table>	Action	Document Name	Select	1619-SSI Status Verification	Select	Acuerdo de Responsabilidad Personal	Select	Affidavit For Replacement Of Food Stamp Benefits	Select	Application Document Cover Sheet	Select	Application Document Cover Sheet (Spanish)	Select	Application for Assistance - Part 2 (CAF)
Action	Document Name														
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Select	Acuerdo de Responsabilidad Personal														
Select	Affidavit For Replacement Of Food Stamp Benefits														
Select	Application Document Cover Sheet														
Select	Application Document Cover Sheet (Spanish)														
Select	Application for Assistance - Part 2 (CAF)														
10.	<p>Click the magnifying glass icon to display the document names for the selected Document Type.</p> <div> <div>*Document Name: </div> <div></div> </div>														
11.	<p>On the Select Document Name screen, click Search. Click Select to choose the correct Document Name.</p> <p>Select Document Name</p> <p>Select Document Name</p> <div> <div>Document Type: Eligibility Support Documents</div> <div>Document Name: </div> <div> <div>Search</div> <div>Reset</div> <div>Cancel</div> </div> </div> <table> <tr> <th>Action</th><th>Document Name</th></tr> <tr> <td>Select</td><td>1619-SSI Status Verification</td></tr> <tr> <td>Select</td><td>Acuerdo de Responsabilidad Personal</td></tr> <tr> <td>Select</td><td>Affidavit For Replacement Of Food Stamp Benefits</td></tr> <tr> <td>Select</td><td>Application Document Cover Sheet</td></tr> <tr> <td>Select</td><td>Application Document Cover Sheet (Spanish)</td></tr> <tr> <td>Select</td><td>Application for Assistance - Part 2 (CAF)</td></tr> </table>	Action	Document Name	Select	1619-SSI Status Verification	Select	Acuerdo de Responsabilidad Personal	Select	Affidavit For Replacement Of Food Stamp Benefits	Select	Application Document Cover Sheet	Select	Application Document Cover Sheet (Spanish)	Select	Application for Assistance - Part 2 (CAF)
Action	Document Name														
Select	1619-SSI Status Verification														
Select	Acuerdo de Responsabilidad Personal														
Select	Affidavit For Replacement Of Food Stamp Benefits														
Select	Application Document Cover Sheet														
Select	Application Document Cover Sheet (Spanish)														
Select	Application for Assistance - Part 2 (CAF)														

Step**Create an Attachment from the File Server**

12.

Click *Save*.

FSSA - WFMS Create Attachment: - Microsoft Internet Explorer provided by FSSA - State of Indiana

File Edit View Favorites Tools Help

Address: https://s990atap01.iem.local:11213/HCSSApplication/en_US/EMStandardCaseDocument_createAttachmentPage.do?caseID=9002662691&_o3rpu=EMStandardCaseDocur Go Links >>

Family and Social Services Administration

navigation

recent items

Create Attachment: Help

Select file to attach

*File: c:\winnt\profiles\crosbyd\ Browse...

Details

*Document Type: Eligibility Support Documents *Document Name: Interactive SEC Interview Guide

Save Save & New Cancel

Start FSSA - WFMS Create ... Work Instructions Work Instructions - Com... 6:37 PM

Step	Create an Attachment from the File Server																																				
13.	<p>The document is attached to the case and viewable (along with other documents indexed to the case) by clicking Documents in the Left Navigation bar.</p> <table><tr><td>View Edit</td><td>Vital Statistics</td><td>Birth Certificate</td><td>brenda tompkins</td><td>10/3/2007</td><td>Received</td></tr><tr><td>View Edit</td><td>Vital Statistics</td><td>Social Security Card</td><td>brenda tompkins</td><td>10/3/2007</td><td>Received</td></tr><tr><td>View Edit</td><td>Vital Statistics</td><td>Birth Certificate</td><td>brenda tompkins</td><td>10/3/2007</td><td>Received</td></tr><tr><td>View Edit</td><td>Vital Statistics</td><td>Social Security Card</td><td>brenda tompkins</td><td>10/3/2007</td><td>Received</td></tr><tr><td>View Edit</td><td>Unknown</td><td>Unknown document</td><td>BRENDA TOMPKINS</td><td>10/4/2007</td><td>Reviewed</td></tr><tr><td>View Edit</td><td>Policy Support Forms</td><td>Policy Interpretation Request/Response</td><td>BRENDA TOMPKINS</td><td>10/4/2007</td><td>Received</td></tr></table> <p>If the form does not require further action, return to originating work instructions. If the form or document is required to be acted upon, refer to Create a Task Work Instruction (Insert hyperlink Section 3.11.1.2).</p>	View Edit	Vital Statistics	Birth Certificate	brenda tompkins	10/3/2007	Received	View Edit	Vital Statistics	Social Security Card	brenda tompkins	10/3/2007	Received	View Edit	Vital Statistics	Birth Certificate	brenda tompkins	10/3/2007	Received	View Edit	Vital Statistics	Social Security Card	brenda tompkins	10/3/2007	Received	View Edit	Unknown	Unknown document	BRENDA TOMPKINS	10/4/2007	Reviewed	View Edit	Policy Support Forms	Policy Interpretation Request/Response	BRENDA TOMPKINS	10/4/2007	Received
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View Edit	Vital Statistics	Social Security Card	brenda tompkins	10/3/2007	Received																																
View Edit	Unknown	Unknown document	BRENDA TOMPKINS	10/4/2007	Reviewed																																
View Edit	Policy Support Forms	Policy Interpretation Request/Response	BRENDA TOMPKINS	10/4/2007	Received																																
14.	<p>After confirming that the document is attached to the correct case, go to the folder under My Documents on the hard drive of your computer where you saved the document in Step 10; delete the document from the hard drive.</p>																																				

3.11.4.13 Re-mail Correspondence in ICES

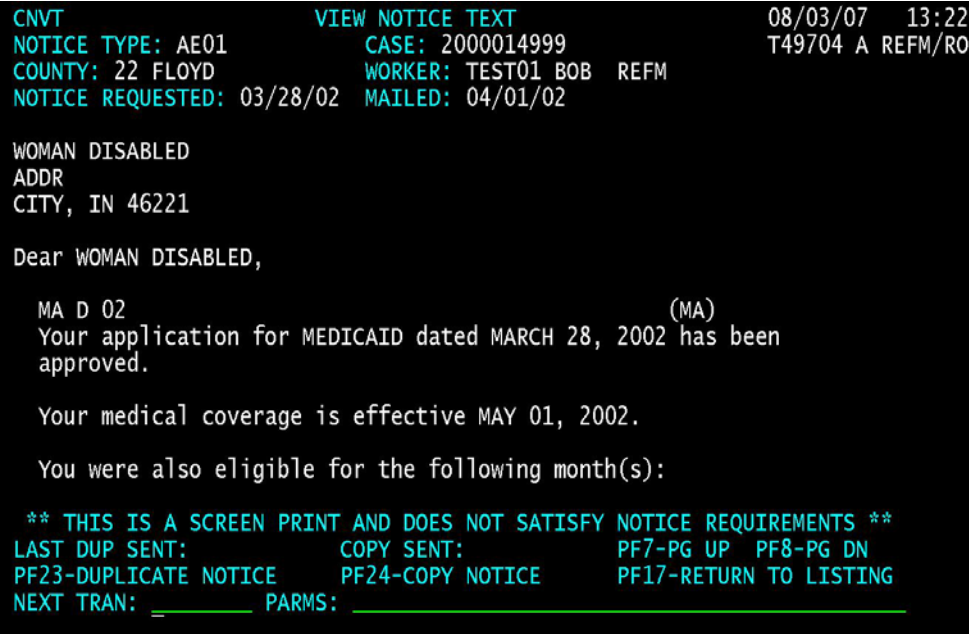
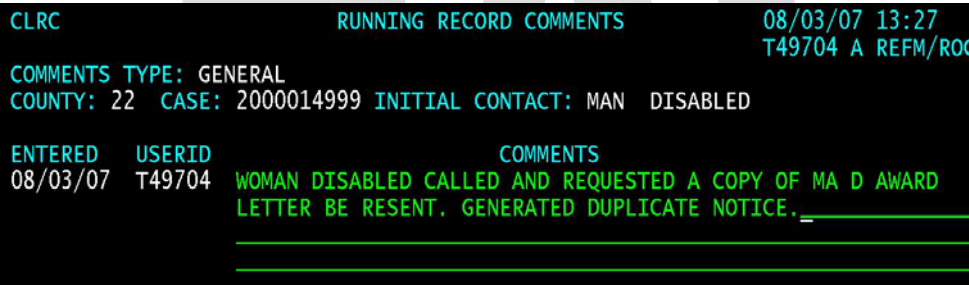
ICES notices are automatically generated as a result of temporal events or actions taken in ICES. Therefore the only correspondence type that can be manually generated from ICES is a duplicate notice if a Client and/or authorized representative requests a copy.

3.11.4.14 Correspondence Screens in ICES


Summary Screen	Detail Screen	Description
CNVN		VIEWABLE NOTICE LISTING – Provides a record of all Client notices that have been generated in the current month and the three previous months.
	CNVT	VIEW NOTICE TEXT – Provides a view of the text of Client notices that have been generated in the current month and the three previous months.
CNHS		NOTICE HISTORY – Provides a record of all Client notices that have been generated.
	CNDH	NOTICE HISTORY DETAIL – Provides information about a specific Client notice that has been generated by the system.

3.11.4.15 Re-mail Correspondence in ICES from CNVN

Step	Re-mail Correspondence in ICES from CNVN																					
1.	<p>In ICES, navigate to the correspondence history for the associated case record by entering TRAN: CNVN; PARMS: ICES Case Number.</p> <p>NEXT TRAN: CNVN_____ PARMS: 2000014999_____</p>																					
2.	<p>From the ICES notice history, identify the notice to be re-mailed.</p> <div><div>CNVNVIEWABLE NOTICE LISTING08/03/07 T49704 A</div><div>CASE/APPL NBR. 2000014999</div><table><thead><tr><th>SEL</th><th>MAILED</th><th>TYPE</th><th>ADDRESSEE</th><th>CAT</th><th>SEQ</th><th>CONTENT</th></tr></thead><tbody><tr><td>01</td><td>04/01/02</td><td>AE01</td><td>WOMAN DISABLED</td><td>MA D</td><td>02</td><td>MEDICAID APPROVAL</td></tr><tr><td>02</td><td>04/01/02</td><td>AE01</td><td>MAN DISABLED</td><td>MA D</td><td>01</td><td>MEDICAID APPROVAL</td></tr></tbody></table><div>ENTER SELECTION NUMBER: 01 PFKEY 16: VIEW NOTICE TEXTPFKEY 17: BACK TO TOP</div></div>	SEL	MAILED	TYPE	ADDRESSEE	CAT	SEQ	CONTENT	01	04/01/02	AE01	WOMAN DISABLED	MA D	02	MEDICAID APPROVAL	02	04/01/02	AE01	MAN DISABLED	MA D	01	MEDICAID APPROVAL
SEL	MAILED	TYPE	ADDRESSEE	CAT	SEQ	CONTENT																
01	04/01/02	AE01	WOMAN DISABLED	MA D	02	MEDICAID APPROVAL																
02	04/01/02	AE01	MAN DISABLED	MA D	01	MEDICAID APPROVAL																

Step	Re-mail Correspondence in ICES from CNVN
3.	To view the notice text, enter the selection number. Press the PF16 key.
4.	<p>ICES displays screen CNVT – View Notice Text.</p>  <p>The screenshot shows the following information:</p> <pre> CNVT VIEW NOTICE TEXT 08/03/07 13:22 NOTICE TYPE: AE01 CASE: 2000014999 T49704 A REFM/RO COUNTY: 22 FLOYD WORKER: TEST01 BOB REFM NOTICE REQUESTED: 03/28/02 MAILED: 04/01/02 WOMAN DISABLED ADDR CITY, IN 46221 Dear WOMAN DISABLED, MA D 02 (MA) Your application for MEDICAID dated MARCH 28, 2002 has been approved. Your medical coverage is effective MAY 01, 2002. You were also eligible for the following month(s): ** THIS IS A SCREEN PRINT AND DOES NOT SATISFY NOTICE REQUIREMENTS ** LAST DUP SENT: COPY SENT: PF7-PG UP PF8-PG DN PF23-DUPLICATE NOTICE PF24-COPY NOTICE PF17-RETURN TO LISTING NEXT TRAN: _____ PARMS: _____ </pre>
5.	Press PF23 to generate a copy of the notice to be re-mailed.
6.	<p>Enter TRAN: CLRC; PARMS; ICES Case Number. Update case notes regarding action taken.</p>  <p>The screenshot shows the following information:</p> <pre> CLRC RUNNING RECORD COMMENTS 08/03/07 13:27 T49704 A REFM/RO COMMENTS TYPE: GENERAL COUNTY: 22 CASE: 2000014999 INITIAL CONTACT: MAN DISABLED ENTERED USERID COMMENTS 08/03/07 T49704 WOMAN DISABLED CALLED AND REQUESTED A COPY OF MA D AWARD LETTER BE RESENT. GENERATED DUPLICATE NOTICE. _____ </pre>

3.11.4.16 Re-mail Correspondence in ICES from CNHS

Step	Re-mail Correspondence in ICES from CNHS
1.	<p>In ICES, navigate to the correspondence history for the associated case record by entering TRAN: CNHS; PARMS: ICES Case Number.</p>  <p>The screenshot shows the command line: NEXT TRAN: CNHS_____ PARMS: 2000014999_____</p>

Step	Re-mail Correspondence in ICES from CNHS
2.	<p>From the ICES notice history, identify the notice to be re-mailed.</p> <pre> CNHS NOTICE HISTORY 08/03/07 13:33 T49704 A REFM/RO CASE/APPL NBR. 2000014999 DTL ***** NOTICE ***** ***** WORKER ***** SEL MAILED REQUESTED TYPE CAT SEQ NUMBER NAME 1 04/01/02 03/28/02 AE01 MA D 01 TEST01 B REFM/ROGER 2 04/01/02 03/28/02 AE01 MA D 02 TEST01 B REFM/ROGER ENTER SELECTION NUMBER: 01 PFKEY 15: NOTICE DETAIL INFORMATION </pre>
3.	To view the notice detail information, enter the selection number. Press the PF15 key.
4.	<p>ICES displays screen CNHD – Notice History Detail.</p> <pre> CNHD NOTICE HISTORY DETAIL 08/03/07 13:50 NOTICE TYPE: AE01 APPROVAL NOTICE T49704 A REFM/RO CASE/CAT/SEQ: 2000014999 MA D 02 AG NAME: WOMAN DISABLED COUNTY: 22 FLOYD WORKER: TEST01 BOB REFM NOTICE REQUESTED: 03/28/02 MAILED: 04/01/02 REASONS: MAILED TO: WOMAN DISABLED ADDR APPL DATE CITY : 03/28/02 , IN 462210000 STATUS : APPROVED EFF DATE : 05/01/02 LAST DUP SENT: COPY SENT: PF-8 NEXT PAGE PF23-DUPLICATE NOTICE PF24-COPY NOTICE PF17-RETURN TO SUMMARY NEXT TRAN: _____ PARMS: _____ </pre>
5.	Press PF23 to generate a copy of the notice to be re-mailed.

Step	Re-mail Correspondence in ICES from CNHS
6.	<p data-bbox="264 243 1370 275">Enter TRAN: CLRC; PARMS; ICES Case Number. Update case notes regarding action taken.</p> <div data-bbox="264 275 1386 609"> <div data-bbox="264 275 1386 348"> <div data-bbox="264 275 341 317">CLRC</div> <div data-bbox="647 275 990 317">RUNNING RECORD COMMENTS</div> <div data-bbox="1136 275 1386 348"> 08/03/07 13:27 T49704 A REFM/RO </div> </div> <div data-bbox="264 348 1386 411"> <div data-bbox="264 348 597 380">COMMENTS TYPE: GENERAL</div> <div data-bbox="264 380 1133 411"> COUNTY: 22 CASE: 2000014999 INITIAL CONTACT: MAN DISABLED </div> </div> <div data-bbox="264 432 1386 609"> <div data-bbox="264 432 513 464">ENTERED USERID</div> <div data-bbox="834 432 959 464">COMMENTS</div> <div data-bbox="264 464 1386 609"> 08/03/07 T49704 WOMAN DISABLED CALLED AND REQUESTED A COPY OF MA D AWARD LETTER BE RESENT. GENERATED DUPLICATE NOTICE. _____ _____ _____ </div> </div> </div>

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